

Gift of Stock Transmittal Form

_____	_____	_____	_____
Date of Transfer/Record	Received by Gift Processing:	Date	Initial
	Entered on Advance System:	_____	_____

_____	_____	_____	_____
Name of Donor	Entity #	Source of Information	Date
_____	Joint Gift: Yes ☐	_____	
Address	No ☐	Spouse Name	

City, State, Zip Code			

_____	_____	_____	_____	_____
Name of Stock	Number of Shares	Per Share \$ Value	High	Low

_____	_____
Pledge #	Stock Broker or Certificate #

_____	_____	_____	_____	_____
Amount	Allocation Number	Amount	Allocation Number	Total Amount
Acct Name: _____		Acct Name: _____		

Comments: _____

_____	_____	_____	_____
Gift Receipt #	Date Gift Receipt Mailed	Entered on Advance System:	Date
		Packet Reviewed for Filing:	Initial

_____	_____	_____	_____
Date of Sale	Sale Price	Commission/Fees	Net Proceeds

_____	_____	_____
Development Deposit Date	JV to Record Gift & Sale	JV to Move Gift from Holding Account (If Necessary)

_____	_____
CDO / Date Notified	Account Manager / Date Notified

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