



UNIVERSITY OF SAINT MARY OF THE LAKE

STOCK or MUTUAL FUND DONATION - Letter of Intention

Donor: Please complete this form for your STOCK or MUTUAL FUND donation. Complete separate forms for gifts with multiple stocks, mutual funds, and/or programs.

For further assistance or questions: [Jim Jarocki, 847-970-4841](mailto:Jim.Jarocki@usml.edu)
Sandi Seidl, 847-970-4816
stockgifts@usml.edu

I (we) plan to transfer the securities (please check one of the following):

- Electronically (Broker to Broker)
- By Registered Mail
- By Hand Delivery

From: (please print)

Donation Date: _____

| | |
|--------------------------|--|
| Donor Name(s): | |
| Address: | |
| City, State, Zip: | |
| Telephone: | |
| Email Address: | |

Please accept our gift of: _____ shares of _____
(# of shares) *(Name of Security)*

to be credited to the University of St. Mary of the Lake for the benefit of:

- As an unrestricted gift
- To be used for the _____ Program, Institute, or Fund.

REQUIRED: Send this form via one of these methods:

Email: stockgifts@usml.edu

Regular U.S. Mail: University of St. Mary of the Lake
Development Office – Stock Donations
1000 E. Maple Ave
Mundelein, IL 60060-1174

Fax Number: 847-566-7330

| | |
|-----------------------|--|
| Special Instructions: | |
| Other Information: | |



UNIVERSITY
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SECURITIES & STOCK DONATION - Transfer Information

You may transfer securities electronically, by registered mail, or via in-person delivery.

To transfer the securities electronically, provide your bank or broker the following transfer instructions:

Broker: Fidelity Investments
Processor: National Financial Services – DTC #0226
Fidelity Account Number: Z50-918830
St. Mary of the Lake Seminary
For the benefit of (F/B/O): University of St. Mary of the Lake

Additional information your bank or broker may need:

St. Mary of the Lake Seminary Tax ID: 36-2171077

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