



UNIVERSITY
OF
SAINT MARY
OF THE LAKE

STOCK or MUTUAL FUND DONATION - Letter of Intention

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
Sandi Seidl 847-970-4816
stockgifts@usml.edu

Your Broker: _____

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:

- Unrestricted gift**
 Scholarship

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:	



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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: Z26-292755
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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