



Gifts of Appreciated Securities to St. Stephen's Episcopal School - Houston

- When transferring a gift of appreciated securities to St. Stephen's Episcopal School-Houston, please send it directly to the School's account at:
Pershing LLC; Name on Account: St. Stephen's Episcopal School Houston
Account #: 32F011558; DTC# 0443; Agent Bank #: 94109; Institutional #94109
- Prior to transferring stock, please send the School a letter of transmittal that will confirm your gift and how you would like us to utilize it – such as Annual Fund, capital fund, etc. Please state in this letter the name of the appreciated securities and the number of shares to be transferred. You may email this to St. Stephen's Staff Accountant, Kathleen Wiley at kwiley@ststephenshouston.org or fax it to 713-528-4179.
- The date that the stock is received in the School's account is the date of the gift.
- We will sell the stock immediately.
- If you should have any questions about this transaction, please contact St. Stephen's Staff Accountant, Kathleen Wiley at kwiley@ststephenshouston.org or 713-821-9167.

Thank you for your gift to St. Stephen's