



STOCK/SECURITIES GIFT FORM

Gifts of stock / appreciated securities

Gifts of appreciated stock allow donors to support the school while taking advantage of additional tax benefits. Please consult with your financial adviser for more information about these benefits. To make a gift of stock, please refer to the instructions here:

To make a gift of stock, please transfer securities directly to Villa Academy's account at:

UBS Financial Services

DTC Number: 0221

F.A.O. Villa Academy

A/C WI-68007-KD

Tax ID: 91-097-8575

Contact: Ken Powers or Dale Young, (206) 628-6512

We recommend DTC transfers, which are quick and reliable.

Notify the Villa contact below, as well as UBS Financial Services , with the stock NAME and NUMBER of share(s) being gifted:

Heather Walter, Development Associate

Phone: 206-729-0219 x267

Email: hwalter@thevilla.org

Important information for gifts of stock

All securities must be transferred into Villa's name prior to being sold; otherwise, the donor will be responsible for paying capital gains tax on the appreciated asset(s). You or your Advisor must notify Villa and UBS Financial Services when you are making a transfer. Due to security regulations, there are no individual names associated with an account on a stock gift, therefore it is essential that you notify us so we may properly thank and credit you for your generous donation.

Name: _____

Name of Stock: _____ Number of Shares: _____

Broker's Name: _____ Phone: _____

Planned Date of Gift: _____