



Transferring Stock to Brebeuf Jesuit Preparatory School

Two options exist:

- 1. Your broker can open a new account in Brebeuf Jesuit's name, sell the stock on behalf of the school, and send us the resulting gift check.** Since the stock is transferred to our name before the sale, you avoid capital gains tax. If a new account is opened in Brebeuf Jesuit's name, your broker will need to send us some simple standard forms for signatures.
- 2. Your broker can wire transfer the stock to Brebeuf Jesuit's brokerage account.** We will incur some minor cost for commission which slightly reduces the impact of the gift, but not the amount you can deduct for tax purposes. You will be fully credited for the mean price-per-share on the date you transfer shares to the Brebeuf account at Stifel Nicolaus.

Transfers should be directed to our representative:

Debbie Baker

317.571.4512

The Knall/Cohen/Pence Group

Stifel Investment Services

600 East 96th Street, Suite 575

Indianapolis, IN 46240

Your broker should know that **the Brebeuf Jesuit account number at Stifel is 3743-5466** and our **DTC number is 793**. If questions arise, the phone number at Stifel is (317)571.4600.

In order that we record your gift correctly, we ask that you inform the Advancement Office in advance and that your broker send us a **written confirmation indicating the date of transfer, the company name of shares donated, and the number of shares** transferred in your name.

For your information, the school's Federal Tax Identification Number is: 35-1062640.