



STOCK AND/OR MUTUAL FUND TRANSFER INSTRUCTIONS

For all gifts of stock:

A letter of authorization from the donor to the school is required. A letter sample is attached. If you have any questions call Mike Taylor at the number indicated below. Fax a copy to Mike Taylor at 415-364-4509 and John Ring at 415-587-1310.

Stock Contributions

A. Transfers from a donor account at a brokerage house

Note: Donor's broker must initiate transfer.

In addition to the letter mentioned above, please give the following information to the donor broker for transferring to the Archdiocesan broker. (Broker to Broker)

1. First Republic Securities Co., LLC
Attn: Mike Taylor Phone: 415-364-4870
111 Pine Street Fax: 415-364-4509
San Francisco, CA 94111
Email: mtaylor@firstrepublic.com
2. First Republic Securities Co., LLC **DTC #0443**
3. Archbishop Riordan High School Account number is: **33L-088953**
4. Account Name: **Archbishop Riordan High School**
5. Instruct your donor's broker to include the following information on the trailer line (second line) of their transfer instructions.
 - a. **FBO Archbishop Riordan High school and (Donor Name)**

NOTE: Failure to include the above information for each transfer will delay identifying the donation and could cause us not to acknowledge the donation in timely manner.

B. Stock certificates donated directly by donor

1. Instruct the donor to deliver the stock certificate and an executed stock power to the School Office.
OR
2. they can deliver their stock certificate and an executed stock power form (via registered mail) to First Republic Securities at the above address. A letter of authorization must accompany the stock certificate and executed stock power.

Your Name
Your Address
City, State Zip Code
Your Telephone

LETTER OF AUTHORIZATION

Date: _____

Broker Name
Brokerage Firm Name
Address
City, State, Zip Code

Re: {Account Number}

Dear _____:

Please accept this as your authorization to deposit ____ shares of _____ stock into the brokerage account number 33L088953 of Archbishop Riordan High School, a division of the Roman Catholic Archbishop of San Francisco. This purpose for this donation is _____.

Stock transfer information:

First Republic Securities Co., LLC
Attn: Mike Taylor
111 Pine Street
San Francisco, CA 94111
Email: mtaylor@firstrepublic.com

Phone: 415-364-4870
Fax: 415-364-4509

First Republic Securities Co., **DTC #0443**
Archbishop Riordan High School number is: **33L-088953**
Account Name: **Archbishop Riordan High School, a division of the Roman Catholic Archbishop of San Francisco**

Include the donor's name on the trailer line (second line) of their transfer instructions.

Please be sure to notify Mike Taylor at First Republic Securities Co., LLC and John Ring at Archbishop Riordan High School of your stock donation to insure that it is properly tracked and distributed.

Thank you for your attention to this matter. Please call John Ring at 415-586-8200 x264 if you have any questions.

Sincerely,

Customer Signature

Joint Customer Signature