

### Gift of Stock Transmittal Form

Date of Transfer/Record  
Received by Gift Processing: \_\_\_\_\_ Date \_\_\_\_\_ Initial \_\_\_\_\_  
Entered on Advance System: \_\_\_\_\_

Name of Donor \_\_\_\_\_ Entity # \_\_\_\_\_ Source of Information \_\_\_\_\_ Date \_\_\_\_\_  
Address \_\_\_\_\_ Joint Gift: Yes \_\_\_\_\_ No \_\_\_\_\_ Spouse Name \_\_\_\_\_  
City, State, Zip Code \_\_\_\_\_

Name of Stock \_\_\_\_\_ Number of Shares \_\_\_\_\_ Per Share \$ Value \_\_\_\_\_ High \_\_\_\_\_ Low \_\_\_\_\_

Pledge # \_\_\_\_\_ Stock Broker or Certificate # \_\_\_\_\_

Amount \_\_\_\_\_ Allocation Number \_\_\_\_\_ Amount \_\_\_\_\_ Allocation Number \_\_\_\_\_ Total Amount \_\_\_\_\_  
Acct Name: \_\_\_\_\_ Acct Name: \_\_\_\_\_

Comments: \_\_\_\_\_

Entered on Advance System: \_\_\_\_\_ Date \_\_\_\_\_ Initial \_\_\_\_\_  
Packet Reviewed for Filing: \_\_\_\_\_  
Gift Receipt # \_\_\_\_\_ Date Gift Receipt Mailed \_\_\_\_\_

Date of Sale \_\_\_\_\_ Sale Price \_\_\_\_\_ Commission/Fees \_\_\_\_\_ Net Proceeds \_\_\_\_\_

Development Deposit Date \_\_\_\_\_ JV to Record Gift & Salemn 4o Date \_\_\_\_\_