



# Sewickley Academy Securities Transfer Form

Use this form for making a contribution to Sewickley Academy in the form of securities. Please send copies of the completed form to 1) your broker and 2) Sewickley Academy. This will ensure that all involved parties receive proper notification and that your instructions are carried out in a timely manner. The address and fax number for Sewickley Academy are noted below in PART 2. For questions regarding this form, please contact the Advancement Office at (412) 741-2230.

**PART 1:** Instructions for your stockbroker or agent

**BROKER/AGENT:** Please fax a copy of this form to Sewickley Academy at 412-741-9234.

Brokerage Firm: \_\_\_\_\_

Stockbroker: \_\_\_\_\_

Complete Security Name: \_\_\_\_\_

Number of Shares: \_\_\_\_\_ CUSIP Number: \_\_\_\_\_

You are hereby authorized to transfer the securities noted above, now held in Account # \_\_\_\_\_

in the name of \_\_\_\_\_, to the account of Sewickley Academy (Tax ID# 25-0965558).

Please transfer the securities as of \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_ to:

Sewickley Academy Fidelity Brokerage Account  
Account # Z44-209678  
DTC # 0226

Fidelity Brokerage Company  
Attn: TOA Receives  
P.O. Box 770001  
Cincinnati, OH 45277-0036

I / We do hereby certify that the above transfer constitutes a gift to Sewickley Academy and I / we relinquish all further interest in this instrument.

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Sign Name

\_\_\_\_\_  
Date

**PART 2:** Instructions for Sewickley Academy:

Gift purpose: (please check appropriate line)

\_\_\_\_\_ The Fund for Sewickley Academy

\_\_\_\_\_ PICTURE THIS Campaign

\_\_\_\_\_ Other: \_\_\_\_\_

Notes:

Sharon Hurt Davidson, Director of Advancement  
Office of Advancement  
315 Academy Avenue  
Sewickley, PA 15143

(412) 741-2230 - phone  
(412) 741-9234 - fax  
shdavidson@sewickley.org

*Please note that you may be required to file IRS Form 8283 for gifts of securities or property made to Sewickley Academy. Please check with your tax advisor.*