



# Holy Family Catholic High School

8101 Kochia Lane | Victoria, MN 55386  
t: 952.443.4659 | f: 952.443.1822 | www.hfchs.org

## Stock Donation Letter of Instruction (LOI)\*

Date: \_\_\_\_\_

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

Attention Account Representative: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Branch Office Street Address: \_\_\_\_\_

Branch Office City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

*(Most of the above information can be found on donor's brokerage statement)*

RE: GIFT TO HOLY FAMILY CATHOLIC HIGH SCHOOL

Dear Custody Department:

I wish to gift to Holy Family Catholic HS \_\_\_\_\_ shares of \_\_\_\_\_ stock/bond, with the Cusip number or symbol of \_\_\_\_\_, held in my account # \_\_\_\_\_, located at your brokerage firm \_\_\_\_\_. Please send these shares to LPL Financial, DTC #0075 for further credit to account #1992-3259 titled Holy Family Catholic HS. Please designate these funds to the Annual Fund \_\_\_\_\_, the Capital Campaign \_\_\_\_\_, and/or Other Fund \_\_\_\_\_.

Thank you!

Sincerely,

X \_\_\_\_\_

Donor Signature(s)

Print Donor Name(s)

**Donor: Please complete this letter and mail, fax or email a copy to each:**

- 1. Releasing brokerage firm/Account Representative**
- 2. Holy Family Catholic High School**

**Attn: Erin Hesse**

8101 Kochia Lane

Victoria, MN 55386

Phone: (952) 443-4659

**Please indicate how you would like the gift to be allocated.**

- 3. Scott Hallett, Account Representative**

LPL Financial located at Old National Bank

PO Box 399, 600 W. 78<sup>th</sup> Street, Chanhassen, MN 55317

Phone: (952) 905-3144 Fax: (952) 937-0372 Email: s.hallett@kleinbank.com

Once Holy Family Catholic HS receives this LOI from the donor and stock is received into Holy Family's account, a confirmation letter will be sent by the school to the donor for their tax records.

\*This letter is to be used by donor(s) to instruct the current broker to electronically transfer the above designated securities to Holy Family Catholic High School.