



## Donation of Appreciated Securities

**Thank you for your gift of securities to SAINT SIMEON'S FOUNDATION**

_____ Name and type of securities (i.e.: Apple, IBM...)	_____ Number of shares	_____ Date of transfer
_____ Donor's Name	_____ Broker's Name	
_____ Donor's Street Address	_____ Broker's Company	
_____ Donor's City, State and Zip	_____ Broker's Phone Number and Email	
_____ Donor's Phone Number		

SAINT SIMEON'S FOUNDATION's broker contact information is:

UBS FINANCIAL SERVICES - Account Name-Saint Simeon's Home Foundation

SAINT SIMEON'S FOUNDATION's account number with USB FINANCIAL SERVICES is:

DL-36841

For electronic transfers, our Depository Trust Company (DTC) number is: 0221

SAINT SIMEON'S FOUNDATION's tax identification number is: 73-1615760

After SAINT SIMEON'S FOUNDATION receives this form and our broker confirms the donation of securities, an acknowledgement letter will be sent regarding the donation. This letter will indicate the number and type of shares received and the date the shares were received.

Stock information can be mailed to SAINT SIMEON'S FOUNDATION, ATTN: TYLER DAVIS, 3701 N MARTIN LUTHER KING JR, BLVD, TULSA, OK 74106 or emailed to [tylerdavis@saintsimeons.org](mailto:tylerdavis@saintsimeons.org) along with any questions you may have. You may also contact TYLER DAVIS at 918-704-1918 with any questions as well.

All contributions are tax-deductible to the fullest extent provided by law. Every effort will be made to sell non-marketable securities as quickly as possible. For tax purposes, the value of the stock will be an average of the high and low prices on the date of the gift. The donor should be aware of possible tax implications. Please contact your tax advisor for complete tax deductibility rules. This information is not intended as legal, tax or accounting advice.