



# Higher Achievement Gifts of Security Transaction Documentation and Valuation

Fill out the below Information

## Contact Information

To complete a securities gift, please provide your stockbroker with the following information:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email Address: \_\_\_\_\_

Delivering Financial Institution: \_\_\_\_\_

Broker Name: \_\_\_\_\_ Broker Phone \_\_\_\_\_

Signature of Donor(s): \_\_\_\_\_

## Receiving Institution

**DTC Number:** 0443

**Account Number**

PQ2-400964

**Account Name**

Higher Achievement Program, Inc.

## Broker Information

Pershing, LLC/  
McLaughlin Ryder Investments, Inc.

## Gift Information

Expected date of transfer (mm/dd/yyyy): \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Stock/Security	Number of Shares	Approximate Value
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Send this form to Higher Achievement via FAX or EMAIL

### Higher Achievement

Lila Blackney  
Development Associate  
Higher Achievement  
1750 Columbia Rd, NW  
Washington, DC 20009

FAX: (202) 861-7755  
Phone: (202) 838-9045  
Email: lblackney@higherachievement.org

Leave this section blank (to be completed by McLaughlin Ryder Investments, Inc.)

Date of gift: \_\_\_\_\_

Pricing on Date Received:

High \_\_\_\_\_

Low \_\_\_\_\_

Mean \_\_\_\_\_

**Total Value received by contributor (Value determined by date of gift)** \_\_\_\_\_

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

Selling Price Per Share: \_\_\_\_\_

**Total Value received by Higher Achievement (Net proceeds from sale of stock)** \_\_\_\_\_