



# 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

SJ Janjua  
Development Associate  
Higher Achievement  
1750 Columbia Rd, NW  
Washington, DC 20009

FAX: (202) 861-7755

Phone: (202) 838-9045

Email: [sjanjua@higherachievement.org](mailto:sjanjua@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) \_\_\_\_\_