



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 EMAIL

Higher Achievement
 SJ Janjua
 Development Manager
 Email: 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) _____