



How to Donate Stock

Below are step-by-step instructions to make a gift of stock to The Blue Bird Circle.

Stock held by a broker

1. Give your broker the following information to transfer a gift of stock to The Blue Bird Circle
 - The Blue Bird Circle brokerage account is with Morgan Stanley.
 - The Blue Bird Circle's account number is 307061728 and the DTC number is 0015.
2. To ensure that your gift is properly credited and acknowledged, either you or your broker must contact The Blue Bird Circle President at president@thebluebirdcircle.com with the name of the stock, the number of shares being transferred and the date of transfer.

Stock certificate held by the donor

1. Notify The Blue Bird Circle President at president@thebluebirdcircle.com that you are making a gift of stock.
2. Using registered mail, send the unendorsed securities to:
The Blue Bird Circle President
P. O. Box 66027
Houston, Texas 77266-6027
2. In a separate envelope to the same address, send:
 - A letter stating you wish to contribute the securities to The Blue Bird Circle, including the name and number of shares of each stock; and
 - A signed, but otherwise blank, stock power form.

For more information contact The Blue Bird Circle President at president@thebluebirdcircle.com or Treasurer at circletreasurer@thebluebirdcircle.com

The information presented on this page is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor.