



Support Lamplighter Stock Gift Instructions

Making a gift via stock can be an attractive alternative to a gift of cash. The following are the instructions for transferring a gift of publicly traded stock to Lamplighter.

Gifts of publicly traded securities can be made by instructing your broker to transfer your selected shares to the account of The Lamplighter School at Bank of Texas.

Contact: Melissa Morgeson at 214-346-3961 or
 Vickie Wise, CFP at 214-346-3940
 BOSC, Inc., (an affiliate of the Bank of Texas, N.A.)
 5956 Sherry Lane, Suite 100
 Dallas, Texas 75225

Please notify the Advancement Office of your stock gift by calling 214-369-9201, ext 354. Include the name of the company and number of shares you are contributing in your notification. To expedite receipting and acknowledgement, please ask your broker to contact the Advancement Office when the transfer is complete.

Stock Gift Valuation

The value of a publicly traded stock gift is based on the average price of the stock on the date ownership is transferred to Lamplighter. The average is calculated by taking the high and the low for the day.

Closely Held Securities

Stock in companies that are closely held may also be given to Lamplighter. Independent appraisals must be obtained by the donor to ascertain gift value of these securities.