



# Mid-Peninsula High School

## Appreciated Securities Donation Form

Thank you for your interest in donating appreciated securities to Mid-Peninsula High School.

Gifts of stocks or bonds offer two tax advantages to many donors. First, by contributing appreciated securities held for more than one year, you avoid paying capital gains tax on the appreciation. Second, you qualify for a charitable deduction on your income tax based on the value of the securities on the date you make a gift. A gift of securities is one of the more attractive ways of making a gift to Mid-Pen. To ensure a smooth transfer of stock, please follow these instructions.

### PART 1: ELECTRONIC DELIVERY INFORMATION

Your broker will use this information to transfer securities to Mid-Pen’s brokerage account.

Brokerage Firm:	Charles Schwab
Branch Office Phone:	415-658-5419
DTC Number:	0164
DTC Code:	40
Account Name:	Mid-Peninsula Education Center Financial Aid Endowment “Pass Through”
Account Number:	2130-0570

### PART 2: DONOR INFORMATION

Unfortunately, when stocks are transferred to our account, we have no way of matching you with your gift unless you notify us. Please complete the following information and fax or email this form to Director of Development Henry Trevor at 650-321-9921 or henry@mid-pen.org. If you prefer, you can call the Development Office at 650-321-1991 x121 with the information. This will ensure that your gift is processed quickly and accurately and that your gift intentions are honored.

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Stock Name \_\_\_\_\_ Symbol \_\_\_\_\_ # Shares or Approx. Value \_\_\_\_\_

Stock Name \_\_\_\_\_ Symbol \_\_\_\_\_ # Shares or Approx. Value \_\_\_\_\_

All gifts will be directed to Mid-Peninsula’s Annual Fund unless otherwise instructed.

Special Instructions \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

*Many thanks for your generous support and interest in Mid-Peninsula High School.  
If you have any questions, please contact Director of Development Henry Trevor at 650-321-1991 x121.  
Mid-Peninsula High School is a 501(c)(3) tax-exempt organization. Tax ID # is 94-2693417.*