

THE NUEVA SCHOOL

Stock Gift Instructions & Donation Form

Thank you for choosing to support The Nueva School with a gift of stock!

In order for us to properly process your donation on an accurate and timely basis, please complete the form below in its entirety **within 48 hours after initiating your transfer.**

Please send the completed form via email or hardcopy to Nueva's Advancement Office, Attn: Advancement, 6565 Skyline Blvd, Hillsborough, CA 94010. Please contact Advancement Office at 650-350-4518 or advancement@nuevaschool.org with any questions.

Broker Information:

Charles Schwab, www.schwab.com

MT #6768-1619

1-800-435-4000

Box 7368

San Francisco, CA 94120

Branch at 1300 S. El Camino Real

DTC: 0164 Code 40

Please note that we can no longer receive stock through our Merrill Lynch / BofA account.

The following information must be provided for each donation:

1. Name of security
2. Number of shares
3. Purpose of the gift (i.e. Capital Campaign)
4. Name of donor's broker or bank
5. Date transfer requested

We thank you for your prompt attention to these details. We do not receive any donor information from our brokers therefore this information is critical to our ability to provide you with a complete and timely acknowledgement letter for tax reporting purposes. Thank you for your generous support!

Stock Donation Form

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THE NUEVA SCHOOL

Donor Information:

Full Name:

Address:

Zip:

City:

Cell Phone:

State: Home Phone:

Email:

BROKER INFORMATION:

Name of Broker:

Name of Firm:

Phone:

Fax:

Email:

TRANSFER INFORMATION:

Date of Transfer:

Name of Security:

Where Traded:

Securities Number:

Description of Shares (Public shares only):

Quantity of Shares:

Value:

Designation of Gift for The Nueva School:

The Nueva Fund Realize the Potential Expanding the Vision Benefit Auction Other

SIGNATURE OF DONOR:

By this signature, I hereby instruct my broker to effect the transfer of proposed above upon confirmation by The Nueva School.

Broker: Jeremy Hoover at Charles Schwab

Account Name: The Nueva School

Account Number: MT #6768-1619

Phone: (415) 667-6229

Email: Jeremy.J.Hoover@schwab.com

The Nueva School is a 501 (c)(3) not-for-profit corporation. Tax ID is #94-1633387