



SERVITE ADVANCEMENT

WE APPRECIATE YOUR APPRECIATED GIFTS!

Donations of stocks, bonds and mutual funds can be the most tax advantageous way for you to make your gift to Servite. You avoid paying capital gains on the appreciated amount and you can deduct the value on the date of transfer, up to 30% of your adjusted gross income for federal income tax purposes.



1. NOTIFY SERVITE HIGH SCHOOL OF YOUR INTENT:

DEENA KENNEDY, DATABASE MANAGER
DKENNEDY@SERVITEHS.ORG
714-774-7575 x1112

2. PROVIDE THE FOLLOWING INFORMATION:

- A. YOUR NAME
- B. STOCK NAME
- C. NUMBER OF SHARES
- D. DATES THE SHARES ARE GOING TO BE TRANSFERRED

3. PROVIDE THE FOLLOWING INFORMATION TO YOUR BROKER/ADVISOR:

DTC: 2663
ACCOUNT: 798780
REGISTRATION: SERVITE HIGH SCHOOL,
A CALIFORNIA CORPORATION
TAX ID: 95-2023055

4. FOR PHYSICAL TRANSFERS OF STOCK OR INFORMATION:

JOHN GERKEN, JR. - REGISTERED PRINCIPAL
JGERKEN@CFIEMAIL.COM
PHONE: 949-600-9900
FAX: 949-600-9908

WEALTH MANAGEMENT ADVISERS
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