Below are instructions for donating gifts of stock to the Roessler-Chadwick Foundation. Please forward these instructions to your broker’s office. Most securities are DTC eligible and should be sent using the instructions under “DTC Eligible Securities.”

**Prior to transferring securities,** please provide the following information to Chadwick School and Charles Schwab using the contact information at the bottom of the page.

**Donor Name(s):** _____________________________________________________________________________

**Broker’s Name:** _____________________________  **Firm:** __________________

**Broker’s Phone:** _____________________________  **Broker’s Fax #:** ______________________________

**Brokerage Firm’s DTC #:** ____________________________  **Date of Transfer:** ______________

**Name of Security:** ____________________________  **# Shares:** ____________________________

**CUSIP#/Ticker Symbol:** ____________________________

### DTC Eligible Securities

Note: Please notify Chadwick School and Charles Schwab prior to transferring securities. (Contact info below.) Please include the donor’s name when initiating the transfer.

DTC Clearing Number 0164
FBO Roessler-Chadwick Foundation
A/C# 4507-3115

### Physical Stock Deliveries

Schwab Institutional
2423 E. Lincoln Dr.
Phoenix, AZ 85016
FBO Roessler-Chadwick Foundation
A/C# 4507-3115

### Fed Fund Wire Instructions for Gifts of Cash

ABA# 021 000 089
Bank: Citibank
111 Wall Street, New York, NY 10043
For Benefit of Charles Schwab & Co., Inc.
Account #: 40553953
For Further Credit to:
Final Beneficiary: Roessler-Chadwick Foundation
Final Beneficiary A/C# 4507-3115

### International Transfer of Funds

Send by value-dated authenticated wire transfer:
Amount: U.S. dollar amount
Bank: Citibank, NA
New York, NY 10005
SWIFT Address: CITIUS33
For Benefit of Charles Schwab & Co., Inc.
Account #: 4060-7595
For the account of: Roessler-Chadwick Foundation
A/C# 4507-3115

### Contact Information

**Chadwick School**
26800 S. Academy Drive
Palos Verdes Peninsula, CA 90274
Leslie Davison ext. 4149
Mary Baldovin, ext. 4076
Phone (310) 377-1543
Fax (310) 541-0664
ldavison@chadwickschool.org
mbaldovin@chadwickschool.org

**Charles Schwab**
Canterbury Consulting
Hugo Sanchez
Phone: (949) 718-2242
Fax: (949) 721-9973
clientservices@canterburyconsulting.com

Note: Securities are sold within three business days of transfer. However, sale may be delayed if the school and/or Charles Schwab are not notified in advance of a transfer. Gifts are valued on the date of receipt into Chadwick’s gift account.