

Westmark School

THE DIFFERENCE IS BRILLIANT

STOCK TRANSFER INSTRUCTION LETTER

(Please complete and send to your broker)

Date: _____, 20_____

Broker Name: _____

Broker Street Address: _____

Broker City, State, Zip: _____

Broker Phone Number: _____

Dear (Name or Broker / Agent) _____:

I / We wish to make a charitable gift to Learning with a Difference Inc. dba Westmark School.

To that end, please transfer _____ shares of _____ company stock from our account # _____.

PLEASE DO NOT SEND STOCK CERTIFICATES TO WESTMARK SCHOOL. Stock should be transferred directly to the Westmark School stockbroker(s) at First Republic Securities Company as follows:

Attention: Mr. Mike Mancini
Operations Center: onlinebrokerage@firstrepublic.com
Address: 111 Pine Street, San Francisco, CA 94111
Phone: 1-415-288-8091 (Mike) or Operations Center at 1-877-348-5576 Press #2
Fax: 1-415-394-4510

Account Number: 33L102853 DTC #: 0443 Westmark School Tax ID #: 95-4616645

A confirmation letter showing the date of transfer and value of stocks on transfer date would be helpful. Thank you for your assistance.

Sincerely,

X _____

Signature

Please Print Account Holder name(s)

AFTER you have delivered this form to your stockbroker, **PLEASE FAX, MAIL OR EMAIL A COPY OF THIS FORM TO:** The Westmark School, Advancement / Development Office, Attn: Elizabeth Curtis at ecurtis@westmarkschool.org

SOME BROKERAGE FIRMS DO NOT RELEASE THE NAME OF THE DONOR FOR GIFTS OF STOCK. THEREFORE, IT IS IMPERATIVE THAT YOU NOTIFY WESTMARK OF YOUR GIFT OF STOCK PRIOR TO TRANSFER OR SALE SO THAT WE CAN ENSURE THAT YOU ARE GIVEN PROPER CREDIT FOR THE GIFT.

*Westmark School only accepts unrestricted securities per school policy. Restricted or private company stock donations must be approved by the school's Gift Acceptance Committee. Please contact Elizabeth Curtis, Director of Advancement at (818) 986-5045 ext. 316 if you have a question about gifting restricted securities to the school.

5461 Louise Ave, Encino, California 91316
PHONE: (818) 986-5045 ext. 316 **FAX:** (818) 986-2605
EMAIL: ecurtis@westmarkschool.org

*Please note: For all stock donations, the value of the gift will be established on the date of transfer of the stock and is computed to be the average of the high and low value of the stock on the date of transfer. The School is authorized to sell the stock as soon as it is determined to be prudent. The proceeds from the sale of the stock will be invested in accordance with the investment policies of the school.