



## STOCK INSTRUCTIONS – UPDATED JANUARY 2020

***Please note we have changed brokerage accounts – please use the updated information below and disregard previous account information for SunTrust.***

To give a gift of stock to Pace Academy, the donor or his/her broker should transfer the gift shares directly to Pace Academy's broker, CIBC/Reliance Trust. **Before the transfer is complete, the donor or his/her broker should also notify Pace's account manager at CIBC so they can advise the proper way to complete the transfer. Please contact Tori Hood at [tori.hood@cibc.com](mailto:tori.hood@cibc.com) or 404-881-3426.**

The DTC# is 5409. All stock gifts should be transferred using the main CIBC account number (FBO) shown below in section I.

Section II below shows the specific account numbers needed for further credit (FFC) to make sure the gift is credited to the appropriate Pace account.

### **Section I For Benefit Of (FBO)**

<u>Name of Account</u>	<u>Account #</u>
CIBC National Trust Company	# 74-2061-01-3

### **Section II For Further Credit (FFC)**

<u>Name of Account</u>	<u>Account #</u>
Pace Academy, Inc. Gift – Annual Fund	# 60-1449-03-6
Pace Academy, Inc. Gift – Capital Campaign	# 60-1449-04-4

At the time of transfer, the donor or his/her broker should notify the Pace Advancement Office, [advancement@paceacademy.org](mailto:advancement@paceacademy.org), of the number of shares being gifted, stock company(s), and the fund for which they are intended (Annual Fund or Capital Campaign). This will help ensure the gift is credited to the correct donor for tax acknowledgment purposes.