



GIFTS OF APPRECIATED SECURITIES

INSTRUCTIONS: To transfer stock shares directly from your brokerage account to King School’s account, please follow the instructions below:

- Please complete this form in its entirety and send a copy to the following parties:
 1. Your broker
 2. King’s Development Office
 - Email: giving@kingschoolct.org
 - Mail: 1450 Newfield Avenue, Stamford, CT 06905
 - Phone: Jill Meister, Director of Prospect Management and Stewardship (203) 322-3496 Ext. 401
- Your stock is valued as the average of the high and low prices on the date of transfer - this is the date the stock was electronically transferred to King School and received by our broker.
- **IMPORTANT NOTE:** You may be required to complete documentation from your brokerage firm to initiate the transfer. Please contact your broker to confirm requirements.

This form serves as notification of your intention to make a gift of stock or bonds to King School. It is important that we are notified prior to every stock or bond transfer, in order for us to accurately identify, allocate, and acknowledge your gift. To transfer mutual funds, foreign stocks, physical certificates, or any other gifts that may require special instructions please call King School at (203) 322-3496 Ext. 401 or email giving@kingschoolct.org.

Please complete the following information. Required fields are marked with an asterisk (*).

PERSONAL INFORMATION

(Please Type or Print Clearly)

Name*: _____

Address: _____
Street
City
State
Zip Code

GIFT INFORMATION

Brokerage Firm*: _____

Broker’s Name*: _____ **Broker’s Phone Number*:** _____

Number of Shares*: _____ **Security Name*:** _____

Ticker Symbol (if known)*: _____ **Gift Designation*:** _____

***Please accept this security transfer request as your authorization to deliver via
DTC the securities listed above to King School’s account as follows:***

DTC Instructions:

DTC #: 0164 (include the leading zero)
Receiving Institution: Charles Schwab & Co. Inc.
Account Title/Registration: King School, Inc.*
Tax Identification #: 06-1229222

*** This is the legal name of King School and the Account Title that must be used to ensure delivery.**

Signature of Account Owner(s): _____ **Date:** _____