

# 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: Ms. Gloria Wong

**Operations Center:** [onlinebrokerage@firstrepublic.com](mailto:onlinebrokerage@firstrepublic.com)

**Address:** 111 Pine Street, San Francisco, CA 94111

**Phone:** 1-415-288-8091 (Gloria) 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,

Signature \_\_\_\_\_

Please Print Account Holder name(s) \_\_\_\_\_

**AFTER you have delivered this form to your stockbroker, PLEASE MAIL, FAX, OR EMAIL THIS FORM TO: Westmark School, Advancement Office, 5461 Louise Avenue, Encino, CA 91316, FAX: 818-986-2065, EMAIL: [advancement@westmarkschool.org](mailto:advancement@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 the Advancement Office at 818-986-5045 if you have a question about gifting restricted securities to the school.**

\*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.