



Securities Transfer Request Form

Common stock can be transferred directly from your brokerage account to Pacific Ridge School's account. Complete the form below and send a signed copy to your broker. Only your broker can initiate the transfer process. Some brokerage firms may require this letter to be Notarized or Medallion Signature Guaranteed. Please discuss this or other necessary requirements with your broker.

Please submit a copy of this request form to Allissa Thompson, Annual Fund and Major Gifts Manager, at Pacific Ridge School via email, [athompson@pacificridge.org](mailto:athompson@pacificridge.org) to notify us of the transfer request. This is to ensure the timely receipt of your gift.

Date: \_\_\_\_\_

To: \_\_\_\_\_

Broker's Name

Brokerage Firm

Brokerage Phone

Brokerage Fax

Please accept this letter as your authorization to irrevocably transfer:

\_\_\_\_\_  
Name of Stock Number of Shares

\_\_\_\_\_  
Name of Second Stock, If Applicable Number of Shares

Which is held in the name of: \_\_\_\_\_  
Account Title of Brokerage Account

From account number: \_\_\_\_\_

To the account of Pacific Ridge School (Tax ID #86-1061606) via DTC transfer as follows:

Receiving Firm/Clearing house: Pershing

DTC #0443

Account Number: 33L-062735

Account Registration: Pacific Ridge School

Pacific Ridge School's Broker: Mary Jane Reyes

[mjreyes@firstrepublic.com](mailto:mjreyes@firstrepublic.com)

(P) 415.296.5884; (F) 415.262.4183

Gift Designation: \_\_\_\_\_  
(Purpose of Gift)

Please provide Pacific Ridge School with my/our name(s) as the donor(s).

\_\_\_\_\_  
Signature of Account Owner 1

\_\_\_\_\_  
Signature of Account Owner 2

\_\_\_\_\_  
Print Name of Account Owner 1

\_\_\_\_\_  
Print Name of Account Owner 2