



[www.ridgefieldacademy.org](http://www.ridgefieldacademy.org)  
[www.landmarkpreschool.org](http://www.landmarkpreschool.org)

Ridgefield 203.894.1800  
Bedford Preschool 914.234.2300  
Westport Preschool 203.226.6982

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## DTC Eligible Securities Transfer Instructions

Client Name: Ridgefield Academy  
Schwab Account Number: 3102-5438  
DTC #: 0164, Code 40

Phil McManus, VP  
Eastern Bank Wealth Management  
[ph.mcmanus@easternbank.com](mailto:ph.mcmanus@easternbank.com)  
T: 857.310.0352

Brokers cannot disclose a giftor's identity, to assure proper crediting of the gift, please send the following information to the Ridgefield Academy Advancement Office via mail, email, or fax (below) with the following information:

Name of donor  
Name of the stock to be transferred  
Number of shares and/or approximate gift value  
Gift designation (Annual Fund, Capital Gift, etc.)

Clancy Healy  
Manager of Annual Fund and Alumni Engagement  
Ridgefield Academy  
223 West Mountain Road  
Ridgefield, CT 06877  
T: (203) 894-1800 x 128  
F: (203) 697- 2683  
[chealy@ridgefieldacademy.org](mailto:chealy@ridgefieldacademy.org)

Gift date and valuation are determined per IRS regulations. The official gift date is the date the shares arrive in the Ridgefield Academy account. The value of the stock is the average of the high and low per share (mean market value) on the date of gift.

Please contact the Ridgefield Academy and Landmark Preschool Advancement Office if the gift is in a form other than U.S. stocks.