

Gifts of Appreciated Securities

Stock and mutual fund contributions to Westmark School may be made by completing the following steps:

Step 1: Notify Westmark of your pending gift

It is vital that you notify the Advancement Office when your donation is made, as donor information does not always transmit through the DTC system. Some brokerages do not release donor names, and we won't be able to properly credit your gift unless you let us know about it.

Please simply send an email to AdvServices@westmarkschool.org with the following information:

- Your name:
- Name of the stock/securities:
- Number of shares:
- Purpose of donation (e.g. "Westmark Fund" or "Gala"):
- Do you wish to remain anonymous?

Step 2: Make your gift through your brokerage

DTC or electronic transfer

Deliver to: First Republic Securities Company LLC

DTC: 0443 (clearing through Pershing LLC)

Account #: 33L102853

Account Name: Learning with a Difference Inc. dba
Westmark School (EIN 95-4616645)

Reference: Include your name or note the gift is anonymous; for tax purposes, we must still know the source of the donation, but we will, of course, honor your wishes about gift recognition.

Mutual fund

Please contact Gloria Wong at First Republic Securities Company at onlinebrokerage@firstrepublic.com with the following information:

- Account number:
- Share quantity:
- Symbol:
- Donor name (or anonymous):
- Financial institution:

Should you have any questions, please email AdvServices@westmarkschool.org.

Of note: School policies on gifts of securities

For all stock donations, the value of the gift will be established on the date of transfer of the stock, computed as the average of the high and low value of the stock on the date of the transfer, per IRS regulations outlined in Publication 561 - Determining the Value of Donated Property.

The school is authorized to sell gifts of securities as soon as it is determined to be prudent. The proceeds from the sale of any securities will be invested in accordance with the investment policies of the school.

It is the policy of Westmark School to accept only unrestricted securities. 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.

Sample Brokerage Letter

You can send a letter like this one to authorize a gift of securities to Westmark School. Some brokerages may have other procedures for this, including online portals for gift processing. Contact your brokerage directly if you are unsure how to process your gift.

[DATE]

[BROKER NAME]

[BROKER STREET ADDRESS]

[BROKER CITY, STATE ZIP]

[BROKER PHONE]

Dear [BROKER/AGENT NAME],

I/We wish to make a charitable gift to **Learning with a Difference Inc. dba Westmark School**. To that end, please transfer [###] shares of [SECURITY NAME] company stock from account number [#####].

Please do not send stock certificates to Westmark School. Stock should be transferred directly to the Westmark School brokerage account as follows:

| | |
|----------------------|--|
| Brokerage: | First Republic Securities Company |
| Attention: | Ms. Gloria Wong |
| Address: | 111 Pine Street, San Francisco, CA 94111 |
| Phone: | 415-288-8091 (Gloria) or 877-348-5576 opt. 2 (Operations Center) |
| Fax: | 415-394-4510 |
| Email: | onlinebrokerage@firstrepublic.com (Operations Center) |
| Account Name: | Learning with a Difference dba Westmark School |
| DTC #: | 0443 |
| 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 #1]

[NAME OF ACCOUNT HOLDER #1]

[SIGNATURE #2 (if needed)]

[NAME OF ACCOUNT HOLDER #2 (if needed)]