



Gifting Marketable Securities

Stocks may be given to the George Stevens Academy and are eligible for tax deductions. Transfer instructions for marketable securities and delivery of the securities can be made electronically (via DTC) to our investment account at Harpswell Capital Advisors:

Brokerage – Pershing Advisor Solutions
DTC #0443
Agent Bank #94109
Institutional #94109
FBO George Stevens Academy
A/C # Q3J002127

Harpswell Capital Advisors contact:
Jack Moore
207.926.1348
info@harpswelladvisors.com

Please also contact GSA with the following information so we may properly acknowledge your gift:

Name of the stock(s) to be transferred
Date of stock transfer
Number of shares
Donor's name