



STOCK INSTRUCTIONS – UPDATED OCTOBER 2023

Please note our brokerage account updated their instructions to make a stock gift effective October 2023 – please use the updated information below.

To give a gift of stock to Pace Academy, the donor or his/her broker should transfer the gift shares directly to Pace Academy’s broker, SEI Private Trust Company. **Before the transfer is complete, the donor or his/her broker should also notify Pace’s account manager at CIBC so they can advise the proper way to complete the transfer. Please contact Tori Hood at tori.hood@cibc.com or 404-881-3426.**

The DTC# for SEI Private Trust Company is 2663. All stock gifts should be transferred to one of the specific account numbers listed below to make sure the gift is credited to the appropriate Pace account.

<u>Name of Account</u>	<u>Account #</u>
Pace Academy, Inc. – IMA-Gift – Annual Fund	# 106-3155
Pace Academy, Inc. – IMA-Gift – Capital Campaign	# 106-3163

At the time of transfer, the donor or his/her broker should notify the Pace Advancement Office, advancement@paceacademy.org, of the number of shares being gifted, stock company(s), and the fund for which they are intended (Annual Fund or Capital Campaign). This will help ensure the gift is credited to the correct donor for tax acknowledgment purposes.

Thank you for your support.
Pace Academy Advancement