



WESTRIDGE SCHOOL

324 Madeline Drive
Pasadena, California
91105-3399

t 626.799-1153
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www.westridge.org

Instructions for Transferring Securities to Westridge School

Please follow these 2 steps to ensure proper credit to Westridge School:

1. Notify your broker to contact:

The Capital Group Private Client Services

Dean Catalano
Senior Vice President
Investment Counselor
(310) 996-6582
DNWC_Team@capgroup.com

The Capital Group will require:

Donor's broker/bank and DTC#
Donor's Name
Full description/Name of security
Ticker Symbol/CUSIP of the security
Date of acquisition
Cost Basis
Quantity of the security
Date of delivery of the security to The Capital Group

2. Contact Westridge for instructions on transferring securities to Westridge School.

Please contact:

Lauren Le Ber
Director of Annual Giving
Westridge School
(626) 799-1053 Ext. 264
lleber@westridge.org

Westridge School will require:

Donor name and contact number
Name of security
Number of shares
Purpose of the gift (Annual Fund, Endowment, etc.)

Effective February 2/06/2020