



www.ridgefieldacademy.org
www.landmarkpreschool.org

Ridgefield 203.894.1800
Bedford Preschool 914.234.2300
Westport Preschool 203.226.6982

DTC Eligible Securities Transfer Instructions

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

Phil McManus, VP
Cambridge Trust, (A Division of Eastern Bank)
phillip.mcmanus@cambridgetrust.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.)

Janine Karbon
Development Officer
Ridgefield Academy
223 West Mountain Road
Ridgefield, CT 06877
T: (203) 894-1800 x 128
F: (203) 697- 2683
jkarbon@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.