# Securities Donations

The POST OAK SCHOOL

## STOCK TRANSFER INSTRUCTIONS

If your stocks are held by a broker, please provide them with the following information to send your donation through the Depository Trust Company (DTC) to our representative:

**Merrill Lynch Wealth Management**
Account Rep: Kevin Lopardo (713-993-1526)
Assistant: Jessica Luong (713-993-1536)
DTC: 8862
Post Oak School Brokerage Account: 501-14104

## DONOR INFORMATION

Name: _____

Address: _____

City/State/Zip: _____

Telephone (daytime): _____ Email: _____

## DONATION INFORMATION

Name of stock: _____

Number of shares donated: _____

Date sent: _____

Purpose of donation: _____

_____

To ensure proper acknowledgement of your donation, please send a copy of this form to The Post Oak School:

- **Fax**: 713-661-4959
- **Email**: evanwildstein@postoakschool.org
- **Mail**: The Post Oak School, Attn: Evan Wildstein, 4600 Bissonnet St., Bellaire, TX 77401

*The Post Oak School is a registered 501(c)(3) nonprofit organization, EIN 74-1486232.*