STOCK TRANSFER INSTRUCTIONS FOR CHARITABLE GIFTS TO DREW SCHOOL

Please contact your broker with transfer instructions (see below) and then notify Lyla Max (lylamax@drewschool.org or 415.430.3773) that a transfer will be made and note the type of stocks, approximate number of shares, and the name of the donor’s broker or bank if applicable. Then complete page 2 below.

Please instruct your broker to use the following information for transfer purposes. Drew’s account is held at First Republic Securities Co. LLC. The account information for DTC transfer:

To:  
First Republic Securities Co. LLC / Pershing LLC

Name:  
Drew School

Acctt Number:  
33L007615

DTC #:  
0443

Drew’s Broker:  
Brian Chinn: 415-364-4960
Liz Chi (his assistant): 415-262-8812
Fax: 415-834-7150

For IRS tax return purposes, the date of the gift is the date that shares are received in the Drew account. The gift value is the average of the high and low price on that date. An acknowledgement letter and tax receipt will be sent from Drew via surface mail once the Development Office has received official notification from our broker with the transfer details. This often takes up to 10 days.

If you have actual stock certificates, please contact Mohammad Kazerouni in the Business Office at Drew for instructions at 415-430-3737.

THANK YOU VERY MUCH FOR YOUR SUPPORT!

Drew School is a 501(c)(3) nonprofit corporation. Our tax ID # is 94-2219550.
DREW SCHOOL | 2901 CALIFORNIA STREET | SAN FRANCISCO, CALIFORNIA 94115
NOTIFICATION OF INTENDED SECURITIES GIFT TO DREW SCHOOL

Upon transfer, please complete and fax to 415–346–0720 (Attn: DREW Development Office) Or mail a copy to: Lyla Max, Director of Advancement, DREW SCHOOL 2901 California Street San Francisco, CA 94115

DONOR NAME: ________________________________________________________________

ADDRESS: ___________________________________________________________________

PHONE: ___________________________ EMAIL: ____________________________

SIGNATURE:_________________________ DATE: ________________

PURPOSE OF GIFT: ___ANNUAL FUND ___OTHER (SPECIFY)

Number of Shares: ________________________________

Securities/ Stock Type: ________________________________

Date of Gift: ________________________________

Brokerage Handling Stock Transfer: ________________________________

THANK YOU VERY MUCH FOR YOUR SUPPORT!

Drew School is a 501(c)(3) nonprofit corporation.

Tax ID # is 94-2219550

DREW SCHOOL | 2901 CALIFORNIA STREET | SAN FRANCISCO, CALIFORNIA 94115