

Stock Transfer Gift Instructions

1. The policy of Broadwater Academy is to sell stock as soon as possible after it is transferred into our account. Please do not sell stock before it is transferred.

2. Please inform your broker of the stock you wish to transfer and give him/her the following information:

Charles Schwab & Co., Inc.
Account Name: Broadwater Academy
Account Number: 9505-8588
DTC Number: 0164

3. For your convenience, we are including a Notification of Stock Transfer for you to provide your broker and Broadwater Academy.

4. Please email a copy of the Stock Transfer Letter to Broadwater Academy attention Jenn Burger at jburger@broadwateracademy.org or fax a copy to 757-442-9615.

Thank you for supporting Broadwater Academy.

Notification of Stock Transfer

Please complete and submit this form to your broker and provide a copy to Broadwater Academy, attention Jenn Burger via email at: jburger@broadwateracademy.org or via fax to: 757-442-9615.

Donor Information:

By providing Donor Information, you are enabling Broadwater Academy to provide you with a timely acknowledgement of your gift for tax purposes.

Donor's Name: _____

Brokerage Firm: _____

Please transfer ____ shares of _____ stock from my account to Broadwater Academy's brokerage account at:

Charles Schwab & Co., Inc.
Account Name: Broadwater Academy
Account Number: 9505-8588
DTC Number: 0164

Gift Designation:

Annual Fund

Other: _____

Donor's Signature: _____

Donor's Printed Name: _____

Date: _____

The Broadwater Academy Tax ID Number is: 54-0799130

Broadwater Academy is qualified as a charitable organization under Section 501(c)(3) of the Internal Revenue Code. Contributions to Broadwater Academy are tax-deductible to the extent permitted by law.