

STEVENSON

Gifts of Stocks or Securities

Stevenson School welcomes your gifts of stocks or securities. Transfer of ownership is usually handled electronically between your broker and Stevenson's broker, Charles Schwab. Your broker will need the following information to complete the transfer:

Broker: Charles Schwab
831-622-5921 or 800-435-9050
100 Clock Tower Place #100, Carmel, CA 93923

Account Name: Robert Louis Stevenson School

Account Number: 7517-6903

DTC Number: 0164

Stevenson
Federal Tax ID: 94-1218745

Once you have instructed your broker to transfer your gift, please contact Kristina Morton, Stevenson's advancement services administrator, at 831-625-8311 or kmorton@stevensonschool.org with the name of the stock you are donating and the number of shares. This step will assure you that you will receive full credit for your gift.

Once the transfer is complete, you will receive an acknowledgment letter for your files. Your own broker should be able to give you a value for tax purposes.

Thank you for thinking of Stevenson School.