

## Stock Gifts

### Instructions for making Gifts of Stock or Securities to MP&MS

The donor should take the following steps to initiate a gift of stock to MP&MS:

**1. Phone his/her broker with wire transfer instructions.** The date of the gift receipt is the date these instructions are given; the value of gift is the average price of the stock on the date of transfer. The Development Office will determine this value for the donor.

Wire transfer to MP&MS' account:

**Brokerage: Charles Schwab 800-435-4000**  
**DTC #: 0164 Code 40**  
**MP&MS Account #: 7255-7797**

**2. The donor should notify Judy Regalia** in the MP&MS Development Office by phone 415-924-2608 ext. 235, fax 415-924-9351, or e-mail [jregalia@mpms.org](mailto:jregalia@mpms.org), on the date instructions are given to his/her broker or the transfer is expedited. Please provide the following information:

- A. Name of security
- B. Number of shares
- C. Purpose of the gift (MP&MS Fund, Master Plan)
- D. Name of donor's broker or bank
- E. Date transfer requested
- F. To which of MP&MS accounts the security was transferred

**3. MP&MS will issue a receipt for tax purposes once the securities are sold.**

**4. If donors need to issue a stock certificate, it is preferable that the stock certificate is transferred to/issued in the name of Marin Primary & Middle School.** If donors need to deliver stock certificates issued in his/her own name, the stock certificate should be sent separately from the Stock of Bond Power form and must have a signature guarantee medallion.

Marin Primary & Middle School is a 501(c) (3) not-for-profit corporation.  
Tax ID# 94-2302389.

Thank you for your generous support!