

strong in mind, body, and voice



How to give a gift of stock to Lake Washington Girls Middle School

1. If you would like to make a gift of stock

Please contact the Lake Washington Girls Middle School's Advancement Office with the designation for the stock gift, the number of shares, and the identity of the stock. We prefer that this is done in writing, but you can call the LWGMS Advancement Office directly at 206.760.1526. The fax number is 206.323.9860, email address is sblaisdell@lwgms.org, and our mailing address is 810 18th Ave, Seattle, WA 98122.

To ensure efficient processing of the gift, it is important to communicate the information listed above with the LWGMS Advancement Office. Please do not rely on your stockbroker or wire transfer service to provide us with this information.

2. If your shares are held in an account

Ask your broker to make an electronic transfer of the shares to **Lake Washington Girls Middle School's Charles Schwab & Co. account, number: 25273413. The DTC number is 0164 / Code: 40**, and it is needed if the stock is currently in an account with a company other than Charles Schwab & Co. Once the stock is transferred into Lake Washington Girls Middle School's Charles Schwab & Co account, we will receive notification of the transfer, and a receipt will be sent to you. The effective date of the gift for this method is the date the shares appear in our account.

Please contact the Lake Washington Girls Middle School Advancement Office directly at 206.760.1526 or sblaisdell@lwgms.org, to advise us that the gift has been made.

3. If you hold the certificate for your shares

Please sign the stock over to Lake Washington Girls Middle School, either by endorsing the back of the certificate or by using a stock power. Please make sure to sign your name exactly how appears on the front of the certificate. If you have already had the certificate reissued in the name of Lake Washington Girls Middle School, it is not necessary to provide us with a stock power. Both types should then be mailed to the LWGMS Advancement Office at 810 18th Ave, Seattle, WA 98122.

Due to the nature of the document being mailed, we recommend that you send it via certified/registered/express mail. When the certificate is received, it will be immediately liquidated and a receipt will be sent to you. The effective date of a gift made in this manner is the date of the postmark for certificates still registered to the donor, and the certificate date for those that have been reissued in the name of Lake Washington Girls Middle School.

4. If you are transferring shares of a mutual fund

Please contact the LWGMS Advancement Office to discuss how to initiate the transfer. Because each mutual fund company has its own unique procedure, we will need to contact your mutual fund company or your broker to coordinate the most efficient way to make the transfer. If you have any questions about how to give a gift of stock to Lake Washington Girls Middle School, please email us at sblaisdell@lwgms.org.