

Instructions for Transferring Securities to Westridge School

Gifts of stock can be made by instructing your broker to transfer your selected shares to the brokerage account of Westridge School.

Procedure for electronic transfer of stock

- 1.) Notify your broker you wish to transfer securities to Westridge School
 - Smith Barney – Ms. Jeanne Thompson (626) 304-2431
 - Westridge account #2351586918115
 - Westridge DTC #0418
- 2.) Inform Smith Barney:
 - Name of donor's broker/bank and DTC#
 - Contact name and number
 - Full description/name of security
 - CUSIP of the security
 - Quantity of the security
 - Date of delivery to Salomon Smith Barney
- 3.) Notify Westridge of the pending transfer (by mail, fax, phone or e-mail)**
 - Indicate the type of stock (stock ID or name and number of shares)
 - Indicate the purpose of the gift (Annual Fund, Endowment, etc.)

If you are in possession of the stock certificates

Have the registered owner of the stock endorse the certificates to Westridge School and send a signed stock power *mailed under separate cover*. Also, include a letter stating how you wish the proceeds applied.

****Important:** Please be sure to notify the Westridge School Development Office as to the name of the stock and the number of shares that you are donating in order to ensure that your gift is properly received and credited. Please send notification to:

Westridge School Development Office
Attn: Courtney Seiberling
324 Madeline Drive
Pasadena, CA 91105
(626) 799-1153 ext. 273
Fax: (626) 799-2482
cseiberl@westridge.org

For tax purposes:

The deduction available to donors is based on the average price of the stock the date the gift is received in the Westridge account. This price is determined by the average of the high and low trading prices of the stock on the date the gift is received.