



## WESTRIDGE SCHOOL

324 Madeline Drive  
Pasadena, California  
91105-3399

t 626.799-1153  
f 626.799-9236

[www.westridge.org](http://www.westridge.org)

### Instructions for Transferring Securities to Westridge School

Please follow these 2 steps to ensure proper credit to Westridge School:

#### 1. Notify your broker to contact:

##### The Capital Group Private Client Services

Dean Catalano  
Senior Vice President  
Investment Counselor  
(310) 996-6582  
[DNWC\\_Team@capgroup.com](mailto:DNWC_Team@capgroup.com)

##### The Capital Group will require:

Donor's broker/bank and DTC#  
Donor's Name  
Full description/Name of security  
Ticker Symbol/CUSIP of the security  
Date of acquisition  
Cost Basis  
Quantity of the security  
Date of delivery of the security to The Capital Group

#### 2. Notify Westridge School of the pending transfer (phone or e-mail):

**Rebeca Frohmader**  
Advancement Office  
Westridge School  
(626) 799-1053 Ext. 257  
[rfrohmader@westridge.org](mailto:rfrohmader@westridge.org)

##### Westridge School will require:

Donor name and contact number  
Name of security  
Number of shares  
Purpose of the gift (Annual Fund, Endowment, etc.)

Effective February 2/06/2020