Stock Gift Instructions

Thank you for your interest in gifting securities to Woodside Priory School. We are most grateful for your support. Please contact me when you decide to make a securities gift and provide the information requested below.

1.) ALERT Suzanne Couch, Director of Development of your intention to make a gift of securities - Email: scouch@prioryca.org Phone: (650) 851-6139
   STOCK NAME, # OF SHARES, DATE SHARES ARE TRANSFERRING and DESIGNATED FUND.
   (Donor information DOES NOT transfer so this is necessary for us to link the donor to the stock donation)

2.) Please email a copy of the stock transfer (including stock name and # of shares and designated fund) or ask your broker to send this to Suzanne Couch.

3.) Alert your broker to wire the gifted securities to:
   Benedictine Fathers of the Priory, Inc.
   A/C # 1489-9521DTC  Clearing # 0164 Code 40
   Please allow at least two business days for your stock to transfer.

Our account is at the clearing house location for Charles Schwab, the address of which is P.O. Box 52114, Phoenix, AZ 85072-2114. The phone number is (800) 435-4000, and the fax number is (877) 824-3726. For donors using overnight delivery instead of the fax, send paperwork to 2423 E. Lincoln Circle, Phoenix, AZ 85016.

For purposes of Woodside Priory School records, the value of your stock gift will be determined by multiplying the number of shares by the average of the high and low price on the day your securities enter our account. The date of your contribution for purposes of determining your charitable deduction may differ from the date on which we receive your gift. Please consult your tax advisor to determine the amount of charitable deduction you may claim for your stock gift.

Thank you for your financial support of Woodside Priory School.