

Stock Transfer Gift Instructions

Transfer Stock in 5 Easy Steps

1. The policy of Broadwater Academy is to sell stock as soon as possible after it is transferred into our account. Please do not sell stock before it is transferred.

2. Please inform your broker of the stock you wish to transfer and give him/her the following information:

Charles Schwab & Co., Inc.

Account Name: Broadwater Academy

Account Number: 9505-8588 DTC Number: 0164

3. For your convenience, we are including a Notification of Stock Transfer for you to provide your broker and Broadwater Academy.

4. Please email a copy of the Stock Transfer Letter to Broadwater Academy attn: Abbey Brassfield at abrassfield@broadwateracademy.org or fax a copy to 757*442*9615

5. Please contact Abbey Brassfield at 757*442*9041 ext. 120, if you have any questions or need assistance.

Thank you for supporting Broadwater Academy!

Notification of Stock Transfer

Please complete and submit this form to your broker and provide a copy to Broadwater Academy, attention Abbey Brassfield via email at abrassfield@broadwateracademy.org or via fax at 757*442*9615.

Donor's Name _____

Brokerage Firm _____

Please transfer _____ shares of _____ stock from my account to Broadwater Academy's brokerage account at:

Charles Schwab & Co., Inc.
Account Name: Broadwater Academy
Account Number: 9505-8588
DTC Number: 0164

I wish for my gift to be designated to: Annual Fund Other _____
(check the correct box)

Donor's Signature: _____

Donor's Printed Name: _____

Date: _____

The Broadwater Academy Tax ID Number is: 54-0799130.

Broadwater Academy is qualified as a charitable organization under Section 501(c)(3) of the Internal Revenue Code. Contributions to Broadwater Academy are tax-deductible to the extent permitted by law.