

**STOCK TRANSFER INSTRUCTION LETTER**  
*(Please complete and send to your broker)*

Date: \_\_\_\_\_, 20\_\_\_\_

Broker Name: \_\_\_\_\_  
Broker Street Address: \_\_\_\_\_  
Broker City, State, Zip: \_\_\_\_\_  
Broker Phone Number: \_\_\_\_\_

Dear (Name or Broker/Agent)\_\_\_\_\_:

I /We wish to make a charitable gift to **Learning with a Difference Inc. dba Westmark School**. To that end, please transfer \_\_\_\_\_ shares of \_\_\_\_\_ company stock from our account # \_\_\_\_\_.

**Please do not send stock certificates to Westmark School. Stock should be transferred directly to the Westmark School stockbroker(s) at First Republic Securities Company LLC as follows:**

Attention: Ms. Gloria Wong  
Operations Center: [onlinebrokerage@firstrepublic.com](mailto:onlinebrokerage@firstrepublic.com)  
Address: 111 Pine Street, San Francisco, CA 94111  
Phone: 1-415-288-8091 (Gloria) or Operations Center at 1-877-348-5576 Press #2  
Fax: 1-415-394-4510

**Account Number: 33L102853      DTC #: 0443      Westmark School Tax ID #: 95-4616645**

A confirmation letter showing the date of transfer and value of stocks on transfer date would be helpful. Thank you for your assistance.

Sincerely,  
X

Signature

Please Print Account Holder name(s)

**AFTER you have delivered this form to your stockbroker, PLEASE FAX, MAIL OR EMAIL A COPY OF THIS FORM TO: The Westmark School, Advancement/Development Office, Attn: Chris Cook at [ccook@westmarkschool.org](mailto:ccook@westmarkschool.org).**

**\*Some brokerage firms do not release the name of the donor for gifts of stock. Therefore, it is imperative that you notify Westmark of your gift of stock prior to transfer or sale so that we can ensure that you are given proper credit for the gift.**

**\*Westmark School only accepts unrestricted securities per school policy. Restricted or private company stock donations must be approved by the school's Gift Acceptance Committee. Please contact Chris Cook, Director of Advancement/ Development at (818) 986-5045 ext. 316 if you have a question about gifting restricted securities to the school.**

**5461 Louise Ave, Encino, California 91316**  
**Phone: (818) 986-5045 ext. 316**  
**Fax: (818) 986-2605**  
**Email: [ccook@westmarkschool.org](mailto:ccook@westmarkschool.org)**

\*Please note: For all stock donations, the value of the gift will be established on the date of transfer of the stock and is computed to be the average of the high and low value of the stock on the date of transfer. The School is authorized to sell the stock as soon as it is determined to be prudent. The proceeds from the sale of the stock will be invested in accordance with the investment policies of the school.