

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 as follows:

Account Executive: Dennis Joe, djoe@firstrepublic.com
Operations Center: selfdirected@firstrepublic.com
Address: 1888 Century Park East, Second Floor, Los Angeles, CA 90067
Phone: 1-310-407-7036 (Dennis) or Operations Center at 1-877-348-5576
Fax: 1-310-407-1300

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,

Account Holder name(s) and signature(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: Nancy Nichols at nnichols@westwarkschool.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 Nancy Nichols, Director of Advancement/Development at nnichols@westmarkschool.org 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: nnichols@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.