

How to Make a Gift of Stock to Branson

(Tax ID Number 94-0338330)

We greatly appreciate your consideration of a gift of stock to Branson, and we thank you for your support. Please ask your broker to use the following broker information and account details to conduct the transfer.

Charles Schwab
403 Corte Madera Town Center
Corte Madera, CA 94925
Tel: (415) 945-6405
Fax: (415) 945-6422

DTC #: 164
Acct Name: The Branson School
Acct #: 1790-8147

Also, kindly call or have your broker call, fax, or email the details of your stock transfer, including stock name, and number of shares to Rebecca Houser, so that we can be sure to give you credit for your donation! Please note: Your tax credit is attributed on ***the date the stock arrives in our account***, not the date on which you initiate the transfer.

Please feel free to call with any questions as well.

Rebecca Houser
Tel: (415) 454-3636 ext. 211
Fax: (415) 454-2535
Email: rebecca_houser@branson.org

The Branson School
Development Office
P.O. Box 887
Ross, CA 94957

To give stock in certificate form:

1. If the certificate is in your name, sign the back. (Do not fill in any of the information other than the signature.) If the certificate comes to us without the signature of the named owner/owners, then a “stock power” must be signed.
2. Complete the “Third Party Release” form. (Branson can provide this form.) Have the “Third Party Release” form *notarized*.
3. Attach a letter stating that this stock is a gift to The Branson School. All parties named on the stock certificate should sign the letter. Mail to or drop it off at the Development Office.

Thank you for your generous support!