



## West Side Montessori School-Securities Transfer Request

### Section I. This is a request to (please select one)

- I wish to donate shares of stock to West Side Montessori School. Shares can be transferred directly from your brokerage account to WSMS's account. **Please complete the form below in its entirety and email, mail or fax to your broker to initiate the transfer.** Please send a copy to Sarah Eson (contact information below) as well.
- I wish to donate mutual funds or other types of financial instruments to West Side Montessori School. Please contact or ask your broker to contact 212-662-8000 for further information.

### Section II. Personal Information

Name \_\_\_\_\_

Home Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Please tell us your WSMS connection: Currently enrolled child(ren) name and class \_\_\_\_\_.

Alumni Family, child(ren) name and last year at WSMS \_\_\_\_\_.

Alumna /Alumnus, Last year at WSMS \_\_\_\_\_

### Section III: Gift Information **PLEASE BE SURE TO CONTACT YOUR BROKER TO INITIATE THE TRANSFER**

Your broker's name \_\_\_\_\_ Broker's telephone number \_\_\_\_\_

# of Shares \_\_\_\_\_ Security Name \_\_\_\_\_

Ticker Symbol (if known) \_\_\_\_\_ Gift Designation \_\_\_\_\_

Please accept this security transfer request as your authorization to transfer from account \_\_\_\_\_ to the West Side Montessori School account as follows:

**Firm:** Wells Fargo Securities  
 Attention: Stanley or Arnold Lederman, telephone: 917-351-2000  
**DTC:** 0141  
**Customer Name:** West Side Montessori School Tax ID: 13-1992185  
**Account Number:** 8681-2403  
**WSMS Contact:** Sarah Eson, WSMS Advancement Office  
 309 West 92<sup>nd</sup> Street  
 New York, NY 10025  
 Email: [seson@wsmsnyc.org](mailto:seson@wsmsnyc.org)  
 Phone: 212 662 8000  
 Fax: 212 662 8323

Signature(s) of account owner(s) \_\_\_\_\_

Please be sure that WSMS's Advancement Office is notified of the details of your stock gift to ensure proper acknowledgement of your gift. Please be sure to contact your broker to initiate the transfer. Thank you!