



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.** A copy, scan or fax of the form must be sent to Matthew Bloom at the West Side Montessori School Advancement Office as well. Please see WSMS's contact information below.
- 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 the WSMS Advancement Office at 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
 0141
DTC: West Side Montessori School Tax ID: 13-1992185
 8681-2403
Customer Name: SMatthew Bloom West Side Montessori School
Account Number: 309 West 92nd Street
 New York, NY 10025
WSMS Contact: Email: mbloom@wsmsnyc.org
 Phone: 212 662 8000
 Fax: 212 662 8323

Signature(s) of account owner(s) _____ Please be sure that WSMS is notified of the details of your stock gift to ensure proper acknowledgment of your gift. Please email a copy of this transfer request form to Matthew Bloom mbloom@wsmsnyc.org at 212-662-8323 or a copy can be mailed to WSMS's address noted above. **Please be sure to contact your broker to initiate the transfer.** Thank you!