



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: Matthew Bloom, WSMS Advancement Office
 309 West 92nd
 Street New York,
 NY 10025
 Email: mbloom@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!