



A 1,500 year tradition in preparing young men for life

Transfer Instructions for making a Gift of Securities

Stock Transfers: Once a transfer has been completed, please contact Terri Wysocki, 216.421.2080 x339 or wysocki@cbhs.edu with the details. When a gift of stock has been transferred electronically or a certificate has been issued in the school's name, the individual making the gift is not associated with the donation. We would like to personally "thank you" as well as provide you with an acknowledgment letter for tax purposes. Below are directions for making transfers of stock:

DTC Transfer—DTC transfers are a convenient way to transfer your securities electronically to Benedictine High School. Simply instruct your broker to electronically transfer your securities out of your account and into Benedictine High School's account. Your broker will need the following information:

Brokerage Firm: **Charles Schwab**
Account Name: **Benedictine High School**
Account Number: **1489-9519**
DTC Number: **0164** Reason Code: **40**

Certificate Transfer—Transferring your certificate can be as easy as endorsing the back of the certificate and sending it by certified mail to Benedictine High School. You must sign the certificate in front of a bank officer to obtain a Medallion Signature Guarantee (notary public stamps are not an acceptable guarantor for stock certificates.)

Endorse the certificate exactly as your name(s) appears on the front of the certificate. Next, write Benedictine High School's tax identification number, 34-1619790, in the box on the back requesting a social security number or other identifying number of assignee. Obtain a Medallion Signature Guarantee from a bank officer as this is required on all certificates. Mail it certified mail to:

Benedictine High School
Attn: Terri Wysocki
2900 Martin Luther King Junior Drive
Cleveland, OH 44104

Employee Owned Stock in Non-Retirement Plans—If you purchased stock from your employer (e.g. non-retirement E.S.O.P.) you can instruct them to issue a certificate in Benedictine High School's name. They will need our tax identification number, and our address identified above.

Disclaimer: *The information contained in this document is not intended as a substitute for tax counsel. We strongly recommend you consult with a professional tax advisor before making a gift of securities.*

6/2015