



DONATION OF SECURITIES FORM The Waldorf School of San Diego

Thank you for your gift of securities to The Association for Waldorf Education in San Diego (DBA: "The Waldorf School of San Diego") Please fill out the information below:

Name & Type of Securities (ex: IBM common stock) _____
Number of Shares _____
Date of Transfer

Donor's Name _____
Broker's Name

Donor's Street Address _____
Broker's Company

Donor's City/State/Zip _____
Broker's Phone Number

Donor's Phone Number (Will only be used if question arises or a problem occurs in the donation process)

The Waldorf School of San Diego's **broker contact information** is:

Wedbush Securities
1000 Wilshire Blvd.
Los Angeles, CA 90017

The Waldorf School of San Diego's **account number** with Wedbush Securities is: **25135391**

For electronic transfers, our Depository Trust Company (**DTC**) number is: **0103**
This is the most secure and cost-effective way to process your gift.

The Waldorf School of San Diego's **tax identification number** (FEIN) is: **95-3641387**

After The Waldorf School of San Diego receives this form and our broker confirms the donation of securities, the development staff will issue an official acknowledgment letter to the donor. This letter will indicate the number and type of shares received and date the stock was converted into a gift (day when record ownership of stock was transferred to The Waldorf School of San Diego or the stock was unconditionally delivered to The Waldorf School of San Diego).

Stock information can be mailed to The Waldorf School of San Diego, ATTN: Kim Galvin, 3547 Altadena Avenue, San Diego, CA 92105, emailed to kgalvin@waldorfsandiego.org or called in to 619-287-3054 x303. If you have questions relative to our broker, please contact Jim Biddle, Western International Securities, Inc. (619) 426-3550.

All contributions are tax-deductible to the fullest extent provided by law. Every effort will be made to sell non-marketable securities as quickly as possible. For tax purposes, the value of the stock will be an average of the high and low prices on the date of the gift. The donor should be aware of possible tax implications. Please contact your tax advisor for complete tax deductibility rules.

For WSSD questions, please contact Kim Galvin at WSSD: 619-287-3054 x303 or development@waldorfsandiego.org for any questions. For immediate broker information, please contact Jim Biddle, Western International Securities, Inc. 619-426-3550.

The Waldorf School of San Diego is a registered 501(c)(3) nonprofit organization. Contributions are tax-deductible as permitted by law.

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