

## Giving Gifts of Stock and Other Appreciated Securities to Westminster

If you are interested in giving shares of stock or other appreciated securities to Westminster, there are two ways they can be delivered:

1. Electronic Transfer
- or*
2. Mailing the physical stock certificate to Westminster's Office for Institutional Advancement

Before any gift is transferred, please send an email to Andrea Pinder in the Office for Institutional Advancement at Westminster at [andrapinder@westminster.net](mailto:andrapinder@westminster.net) and Juanita Dixon at US Bank at [Juanita.Dixon@usbank.com](mailto:Juanita.Dixon@usbank.com) to notify them of the pending transfer. In the email, the following must be included:

- Donor name
- Description of security
- Number of shares
- Gift designation (i.e., The Westminster Fund, Teaching for Tomorrow pledge payment, etc.)

**\*\*PLEASE NOTE: If the donor name is not referenced, US Bank will reject the transfer.**

If you wish to make a stock transfer involving mutual funds please call Andrea Pinder at (404) 609-6304 so that we can help expedite the process. The transfer of mutual funds requires special attention and the transaction can take longer to complete.

### Electronic Transfer:

#### DTC-eligible Securities

Delivery free through:

The Depository Trust Company  
Participant # 2803  
For credit to account 001050972578  
Westminster Schools Gift Clearing  
DONOR NAME must be referenced in the notes section

#### Government Securities

Delivery free through:

Federal Reserve Bank of Cleveland  
U.S. Bank, N. A./Trust Department  
ABA 042-000-013  
1040/SPEC  
For credit to account 001050972578  
Westminster Schools Gift Clearing

### Mailing Certificate

Stock certificates can be mailed as long as the donor signs the back transferring the stock to Westminster. Please mail to:

Andrea Pinder  
Office for Institutional Advancement  
The Westminster Schools  
1424 W. Paces Ferry Road NW  
Atlanta, GA 30327

### For your information:

Juanita Dixon may be reached at (202) 261-0784, via fax at (202)-261-0810 or via email at [Juanita.Dixon@usbank.com](mailto:Juanita.Dixon@usbank.com) or Andrea Pinder can be reached at (404) 609-6304 or via email at [andrapinder@westminster.net](mailto:andrapinder@westminster.net)

Westminster's Tax I.D. number is 58-0566206