



Securities Transfer Request Form

Shares of securities can be transferred directly from your brokerage account to Casa di Mir Montessori School's account. Simply complete the form below. Then send a signed copy to your broker. Only your broker can initiate the transfer. Some brokerage firms require this letter to be notarized. Please check with your broker for additional requirements. *If you wish to make a gift of mutual funds, bonds, foreign or restricted stock, please contact Diane Dunning at (408)-429-8470 or email ddunning@casadimir.org, as these require special handling.*

In addition to submitting this form to your broker, please forward a copy to Casa di Mir Montessori School's Development Director, Diane Dunning, at ddunning@casadimir.org, so we can properly account for and acknowledge the gift.

DATE: _____

BROKER NAME: _____

BROKERAGE FIRM: _____

BROKER PHONE NO.: _____

Please accept this letter as your authorization to irrevocably transfer:

Stock name and number of shares: _____

Your Account Title at Brokerage Firm: _____

From Account Number: _____ to the account of
Casa di Mir Montessori School.

Please transfer via DTC as follows:

Account Name: Casa di Mir Montessori Elementary School

Bank name: TD-Ameritrade

DTC No.: 0188

Account No.: 488-303-111

Contact: Wanda Whitehead

Phone: 408-370-3033

Signature(s) of account owner(s):

Account Owner

Date

Account Owner

Date