



How to Make a Gift of Stock & Other Appreciated Securities

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 Sandra Gresham or email sgresham@casadimir.org, as these require different steps to complete.

In addition to submitting this form to your broker, please forward a completed copy to Casa di Mir Montessori School's Development Director, Sandra Gresham, sgresham@casadimir.org

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

Signature(s) of account owner(s):

_____ Account Owner Date

_____ Account Owner Date

Casa Di Mir Montessori School – an American Montessori Society Affiliated School
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