



Instructions for Making a Gift of Stock

1. Please send notification of the intent to transfer stock to the Director of Development:

Epiphany School
3611 E Denny Way
Seattle, WA 98122

Lauren Smith
lsmith@epiphanyschool.org
206.971.3018 (direct)
206.324.2127 (fax)

2. **If possible, please do not transfer securities until you have notified Epiphany School.** Stock transfers often do not reveal the donor's name and the school will not know who has made the gift.

Please include:

- a. Donor name
- b. Broker's name and contact information
- c. Name of securities being transferred
- d. Number of shares that will be transferred and the date of transfer
- e. Purpose of the gift (annual fund, endowment, capital campaign, other)

3. Provide your broker with the following transfer information:

Maggie Callahan
Garde Capital, Inc.
1301 5th Ave, Ste 3030
Seattle, WA 98101

Maggie.callahan@gardecapital.com
206.552.7919 (direct)
206.552.7900 (office)
206.552.7909 (fax)

Custodian: Charles Schwab
Account Name: Epiphany School
Account #: 2612-2382
Depository Trust Corp (DTC) #: 0164
Schwab Contact #: 877.457.6546
Tax ID #23-7014921