

## **Stock Transfer Instructions For gifts to Good Shepherd Lutheran School**

Donor should contact his/her broker with transfer instructions and immediately notify Karen Kane or Nellie Gogas at Good Shepherd Lutheran School that a stock transfer will be made. Date of gift is date shares hit the GSLS account. Gift value is median price on that date. Donor will receive acknowledgement and receipt by mail from GSLS.

### **Smith Barney**

Wire transfer to GSLS account:

DTC# 0418

Smith Barney

Account # 546-29087-15 032

GSLS broker: Richard Otter

1-800-289-9060

**Donor should notify Karen Kane or Nellie Gogas by phone (415-897-2510) or email (office.gsls@verizon.net) when a transfer will be made.** Please advise name of security, number of shares, name of donor's broker or bank if applicable.

If the donor has actual **stock certificates**, ownership of the appropriate number of shares must be transferred to GSLS and new certificate/s issued. He/she should contact Karen Kane or Nellie Gogas for further instructions.

GSLS prefers that donors **not** open an account in the school's name at their own brokerage houses. If a donor insists he/she should contact Karen Kane or Nellie Gogas prior to doing so.

GSLS is a 501 (c) (3) not-for-profit corporation.

Tax ID # 94-1637119.

Thank you so much for your support!