



How to Make a Gift of Securities

Christian Brothers High School

Before a Gift is Made:

- If you intend to make a gift of securities to Christian Brothers High School, please contact the CBHS Philanthropy Office (916-733-3633).
- Please let us know the number of shares and the name of the securities you are intending to give and the purpose of your donation.
- By doing so it allows us to identify your gift when the securities are transferred so that we can properly record and acknowledge your gift.

How to Transfer the Securities:

Contact your broker with instructions to transfer the securities from your account to Christian Brothers' account. Our account for stock transfers is with Charles Schwab.

Account: #2695-3426

Contact: CAP Trust

740 University Avenue

Sacramento, CA 95864

Phone: 916-924-7527 (office phone)

Email: Mike.Genovese@Captrust.com; Raechel.Schepens@captrust.com

Your broker may be instructed to deliver stock shares to:

Charles Schwab Co., Inc. DTC number is 0164, credited to account number 2695-3426, FBO Christian Brothers High School (tax ID # 68-0322360).

***All DTC-Eligible Securities: All deliveries MUST include client name and Schwab account number. Delivery to DTC Clearing 0164, Code 40.**

How Your Gift Will Be Acknowledged:

You will receive an acknowledgement letter from CBHS that will include the date of the gift, the gift description (number of shares, and the value of a share of the security based on the average of the high and low values on the designated date), and the gift designation.

For More Information:

Should you have any questions, please contact the CBHS:

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