



For many donors, making a gift of long-term appreciated securities is an ideal way to support the School.

Before you initiate a transfer, please email our CFO Anna Alemani at [aalemani@pierrepontschool.org](mailto:aalemani@pierrepontschool.org) specifying the name of the donor, the name of the stock to be transferred and the number of shares.

After the school has accepted the stock donation, please provide your broker the following securities transfer instructions:

**Account Holder:** The Pierrepont School

**Account Number:** 8493-8322

**DTC Number:** 0164

**Receiving Institution:** Charles Schwab

Gift date and valuation are determined per IRS regulations. The official gift date is the date the shares arrive in the Pierrepont account. The value of the stock is the average of the high and low per share (mean market value) on the date of gift.

Please check with your attorney or accountant for advice on legal and tax matters.

Thank your support and commitment to Pierrepont School!