Instructions for Making Gifts of Stock to Marin Academy

*If the stock is in a brokerage or bank trust account:*

Instruct your broker/banker to transfer the gifted stock to Marin Academy’s account at Charles Schwab Co., Inc., with the following information:

a. Address of MA’s broker: Charles Schwab Co., Inc.
   403 Corte Madera Town Center
   Brent Lauchle 415-945-6403

b. MA’s account name: Marin Academy Contribution Account

c. MA’s account number: Account #5919-2797

d. DTC # (Deposit Trust Co.): #164

*Please advise Marin Academy of your stock gift - email Teal Conroy at tconroy@ma.org*

Provide Marin Academy the following information:

a. Your gifted stock name and the number of gifted shares
b. Your name, address, and telephone
c. The purpose of your gift (e.g. Annual Fund, Capital Campaign, etc)

You may also send information to:

Marin Academy
Office of Institutional Advancement
1600 Mission Avenue, San Rafael CA 94901
or
FAX: 415.453.9618

For assistance, call: Teal Conroy
Director of Leadership Giving
415.482.3272

tconroy@ma.org

*If the gift is in the form of a stock certificate registered in the donor’s name:*

1. Send the stock certificate(s) to the Advancement Office at Marin Academy
2. Under separate cover, send a signed Stock Power, with the signature notarized or guaranteed by a bank officer or stock broker.

*Marin Academy’s Federal Tax Identification Number is 94-1186189*