

To make a gift of securities to Bertschi School, please contact your broker to determine his/her procedures for the shares to be transferred to Bertschi School's account at:

Merrill Lynch

Account number: 340-04A48

FBO Bertschi School

DTC# 5198

Tax ID#: 91-0975541

Financial Advisor: Roger Bertsch / Tom Mackenzie

Phone: 509-458-4213, Toll Free: 866-458-4213

We recommend DTC transfers, as they are the quickest and most reliable. Be sure your broker knows to make the transfer as soon as you authorize it in order that the value and timing of your gift can be executed immediately.

Please return this form to David Chow (206) 324-2150 in the Advancement office when you have given your broker the instructions so that our broker can be awaiting the transfer.

Details

Your Name _____

Your Address _____

Name of Stock _____ Number of shares _____

Brokerage Firm Name _____ Phone _____

Planned date of gift _____

Gift Designation

This gift of stock/securities is intended for:

- Annual Fund gift
- Unrestricted
- Restricted for the following purpose: _____

NOTE: It is requested that the donor or their financial institution contact the Merrill Lynch Financial Advisor as to when the gift of securities was or will be transferred.