



2227 Tenth Avenue East  
Seattle, Washington 98102  
[www.bertschi.org](http://www.bertschi.org)

# Giving Stock/Securities to Bertschi School

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

Donor: \_\_\_\_\_  
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 Development office when you have given your broker the instructions so that our broker can be awaiting the transfer.

## Details

Your Name \_\_\_\_\_

Name of Stock \_\_\_\_\_ Number of shares \_\_\_\_\_

Broker's 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.