



How to Make a Gift of Stock

Shares of securities can be transferred directly from your brokerage account to Casa di Mir Montessori School's account (information located at the bottom of this document). You may choose to visit your brokers' website and search for their online donation form. You can also complete the form below and send a signed copy to your broker. Some brokerage firms require this form to be notarized. Please check with your broker for additional requirements.

In addition, please forward a completed copy of this form to Casa di Mir Montessori School's Manager of Development, Megan Shumate, mshumate@casadimir.org.

DATE: _____

BROKER NAME: _____

BROKERAGE FIRM: _____

BROKER PHONE NO.: _____

Please accept this letter as your authorization to irrevocably transfer:

Stock name and number of shares: _____

Your Account Title at Brokerage Firm: _____

From Account Number: _____ to the
account of Casa di Mir Montessori School.

Please transfer as follows:

Account Name: Casa di Mir Montessori Elementary School

Bank name: Charles Schwab

Account No.: 75299031

Signature(s) of account owner(s):

_____ Account Owner Date

_____ Account Owner Date

Explore. Learn. Lead.

Casa di Mir School – Preschool thru 8th Grade

90 East Latimer Ave. Campbell, CA 95008 – Phone: (408) 370-3073

