



Stock Gift Instruction Information

There are three ways to make a gift of stock to the Oak Ridge High School Foundation:

1. **Electronic Transfer** (From your Brokerage Account into ORHSF Brokerage Account).

- a) Donor prepares a letter addressed to the Oak Ridge High School Foundation, stating their intentions of transferring a gift of stock. Please indicate the number of shares, name of stock and where you wish for your gift to be directed, once received.
- b) Donor either faxes, mails or e-mails a copy of this gift letter to the person listed at the bottom of these instructions. ***This step is critical to ensure that you will receive credit for the complete value of your stock, on said date of transfer.**
- c) Fax, mail or e-mail your brokerage account manager, instructing him/her to make a direct electronic transfer from your account into the Oak Ridge High School Foundation's brokerage account – to the attention of:

Ameritrade Institutional
Account 913-026115
C/O Hanson McClain Advisors
8775 Folsom Blvd., Suite 100
Sacramento, CA 95826

AMERITRADE DTC NUMBER FOR ELECTRONIC TRANSFER: 0188

OAK RIDGE HIGH SCHOOL FOUNDATION'S ACCOUNT NUMBER AT AMERITRADE: 913-026115

OAK RIDGE HIGH SCHOOL FOUNDATION'S TAX ID NUMBER: 68-0442001

2. **Certificate prepared specifically in the Oak Ridge High School Foundation's name.**

Have your stock transfer agent complete a stock certificate directly to the Oak Ridge High School Foundation and forward to the person listed at the bottom of these instructions.

3. **Stock certificate registered in Donor's name.**

- a) Donor prepares a gift letter addressed to the Oak Ridge High School Foundation stating that the stock certificate is a gift to the Oak Ridge High School Foundation. All legal owners named on the certificate must sign this letter.
- b) All legal owners must sign and date the release on the back of the certificate exactly as they are listed on the face of the certificate.
- c) Mail gift letter and certificate to the person listed at the bottom of these instructions.

Thank you for your cooperation. All correspondence and questions should be addressed to:

Mark Denholm

Oak Ridge High School Foundation

1120 Harvard Way

El Dorado Hills CA 95762

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