



Making a Gift of Securities

Thank you for supporting South Kent School. A gift of appreciated stocks, bonds, or mutual funds is often one of the most tax-efficient ways to support the school. As with all gifts, you should consult your financial advisors to confirm it is advantageous for you to contribute appreciated securities. Most brokerage firms can complete the transfer with just the information below.

Step 1: Let Us Know

Before initiating the transfer, please notify us so we can properly identify your gift. Please include:

- **Your name**
- **Your brokerage firm**
- **The name of the security and its Ticker Symbol**
- **Number of shares**
- **Approximate transfer date**
- **Your gift designation (South Kent Initiative, South Kent Fund, Financial Aid, etc)**

To notify us of the transfer, please contact Jennifer Haase:

Phone: (860) 927-3539 ext. 206 or Email: HaaseJ@southkentschool.org

Step 2: Contact Your Broker

Tell your broker you would like to transfer securities to South Kent School. Provide them with the following information:

BROKER TRANSFER INFORMATION

Receiving Financial Institution: J.P. Morgan Chase Bank **DTC#:** 902

Recipient's Account Title: The South Kent School Corporation **Recipient's Account Number:** B85208001

If your broker has questions regarding delivery instructions, they may contact:

Scott Bowen, CFA

J.P. Morgan Chase Bank, N.A.

(203) 629-3179

Scott.Bowen@jpmorgan.com

Step 3: We'll Confirm Receipt

Once the securities arrive, we'll send you confirmation and an acknowledgment for your records.

The school's taxpayer ID is **06-0646906**.

If You Hold Physical Stock Certificates:

Please contact our Advancement Office before mailing any certificates. We'll provide specific instructions for completing the transfer safely. We're happy to help make the process as simple as possible.

Jennifer Haase

Director of Alumni Stewardship and Data Operations

(860) 927-3539 ext. 206

HaaseJ@southkentschool.org