

**How to make a gift
of appreciated securities
To The Kinkaid School
Tax ID: 76-0295523**

- When transferring a gift of appreciated securities to The Kinkaid School, please send through the School's account at Wells Fargo Advisors. The School's brokerage account is 4376-9492 and the DTC account number is 141.
- The contact person at Wells Fargo Advisors is Jennifer Burdette. You may reach Jennifer Burdette at 713-853-2402.
- **Prior** to receipt by Wells Fargo Advisors, please send the School a letter of transmittal that will confirm your gift. (See accompanying draft.) Please state in this letter the name of the appreciated securities and the number of shares to be transferred. This letter can be faxed to the Advancement Office at 713-243-5049 or scanned and e-mailed to Andrea Ibarra at andrea.ibarra@kinkaid.org.
- The date that the stock is received in the School's DTC account is the date of the gift.
- The value of the stock is determined by taking the average of the high and the low on the date of receipt into the account.
- The securities will be sold no later than the next business day following date of receipt.
- If you should have any questions about this transaction, please call Tom Moore at 713-243-5045 or Andrea Ibarra at 713-243-5046.

THANK YOU FOR YOUR GIFT TO KINKAID!