

**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 0141.
- The contact person at Wells Fargo Advisors is Jennifer Burdette. You may reach Jennifer Burdette at 281-340-8881 or [jennifer.burdette@wellsfargoadvisors.com](mailto:jennifer.burdette@wellsfargoadvisors.com).
- **Prior** to receipt by Wells Fargo Advisors, please send the School a letter of transmittal that will confirm your gift. (See accompanying draft below). Please state in this letter the name of the appreciated securities and the number of shares to be transferred. Please scan and email this letter to Andrea Reyna in the Advancement Office ([andrea.reyna@kinkaid.org](mailto:andrea.reyna@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 Andrea Reyna at 713-243-5046 or Tom Moore at 713-243-5045.

**THANK YOU FOR YOUR GIFT TO KINKAID!**

**LETTER OF TRANSMITTAL**

TO:           The Kinkaid School

FROM:       \_\_\_\_\_

RE:           Gift of Stock

DATE:        \_\_\_\_\_

I/we will be transferring \_\_\_\_\_ shares of \_\_\_\_\_ stock to The Kinkaid School. The School's brokerage account is 4376-9492, and the DTC account number is 0141 at Wells Fargo Advisors.

<b>Gift Type:</b> <input type="checkbox"/> One-time gift <input type="checkbox"/> Pledge payment	<b>Gift Purpose:</b> <input type="checkbox"/> The Kinkaid Fund <input type="checkbox"/> All In Campaign <input type="checkbox"/> Restricted/Other: _____
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**Stock Overage Options:**

If you are paying a pledge installment and the stock value is more than your pledge installment total, how would you like us to apply the extra funds?

- Call me to discuss
- Apply extra funds same as above selection
- Other: \_\_\_\_\_

**Please scan and email this letter to Andrea Reyna at [andrea.reyna@kinkaid.org](mailto:andrea.reyna@kinkaid.org). This will help ensure timely disposition of your gift. Please contact Andrea at (713) 243-5046, if you have any questions.**

**Thank you!**