



DONATING STOCKS TO BRIDGE BOSTON CHARTER SCHOOL

1. TRANSFER YOUR SHARES TO BRIDGE BOSTON FOUNDATION'S INVESTMENT ACCOUNT

Please provide your investment advisor with the following information about our account:

Charles Schwab

DTC#: 0164

Acct Name: Bridge Boston Foundation

Acct#: 1479-3780

Contact: June Duan

Twin Focus Capital Partners

75 Park Plaza

Boston MA, 02116

617-720-4500

2. NOTIFY THE SCHOOL OF YOUR GIFT

Please note that when stocks are transferred to our account, we can only access certain information (number of shares, value, date of transaction). We do not know who donated the shares; therefore we ask you to notify Yully Cha, Executive Director, at the Bridge Boston Charter School with:

Your Name

Address

Email

Date of the transfer

Approximate value of the shares, or number of shares, and/or name of shares

You can reach Yully Cha at:

yca@bridgebostoncs.org

tel. 857-229-1601

Once we have received the transfer, we will send a gift receipt. It is our policy to liquidate any donated shares immediately (i.e., we do not keep the shares as investments). Finally, there may be a 3-5 day delay between the transfer order and the liquidation, and therefore, there may be a slight change in value of gift at transfer and at liquidation. The gift, for our records and yours, will be valued at the liquidation amount.

On behalf of our children, families and entire community, THANK YOU!