

**WILDWOOD SCHOOL
INSTRUCTIONS FOR TRANSFERING APPRECIATED SECURITIES**

1. **Before you instruct your financial advisor to transfer appreciated securities, please call or email Danielle Lesner in the Wildwood Advancement Office** to inform her of the transaction so she may alert our representatives at Goldman Sachs. Please include your name and the name/s of securities to be transferred. This is an essential step which allows us to ascertain who the donation is from and to track the donation in a timely fashion. Danielle's contact information is (310) 806-4525; dlesner@wildwood.org.
2. Instruct your financial advisor to transfer the security to the school providing the information below.

**Goldman Sachs
DTC Clearing #0005
For benefit of account
Name: Wildwood Stock Donation
027-50701-1
Wildwood School
Wildwood Tax ID #95-2921998**

3. Please ask your financial advisor to provide your name and the name and quantity of securities to be transferred to Wildwood's investment advisors at Goldman Sachs. Brandon Geer or Justin Bumgardner can be contacted at (310) 407-5561 or at brandon.geer@gs.com and Justin.bumgardner@gs.com. It is best to share this information via email with both contacts above. **The transfer paperwork received by the school often does not have the donor's name noted, and it is very difficult to identify the donor after the transfer is made.**