

The Carey School
Charles Schwab Securities Transfer Information Sheet
(Please Type or Print Clearly)

Please fill in this form or create a similar letter to be sent to your broker. Send/Fax a copy of this form or your letter to:

Tracy White
The Carey School
One Carey School Lane
San Mateo, CA 94403
Tel: (650) 345-8205
Fax: (650)345 -2528

Charles Schwab
Acct #:2090-4300
Charles Schwab DTC#0164 code 40
The Carey School Tax - Exempt ID: 94-3085954

Date:_____

To:_____

(Name of your brokerage firm)

Attn:_____ Fax#:_____

Please transfer _____ shares _____ stock from
account number _____ in the
name of _____.

Designate gift to: _____
(Annual Fund, Capital Campaign, Other)

Signature:_____

Printed Name:_____

Phone Number:_____

Please send a copy of this letter to:

The Carey School Development Office
One Carey School Lane
San Mateo, CA 94403-1299
Phone: (650) 345-8205
Fax: (650) 345-2528