

How do I make a stock gift?

An increasing number of donors give securities to charitable organizations because they enjoy the ease of giving and the significant tax savings these gifts sometimes create.

If you are interested in making a gift of stock, you or your broker should contact Karen Leavengood, Operations Coordinator for LMS Annual Fund, at (423) 400-9591, or email lmsannualfund@gmail.com. Please provide your name, telephone number, the name of the stock, number of shares, the approximate date you will make the gift, approximate value of the gift. If you are using a broker, please provide his or her name and telephone number. If your shares are held in an account with your broker, provide him/her with the following Depository Trust Company (DTC) directions:

Please request that your broker transfer the shares electronically to the Lookout Mountain School PTO primary account at Merrill Lynch. The DTC directions are:

- DTC 8862
- Merrill Lynch
- Account No: 570 04352
- Ref. Lookout Mountain School Parent Teacher Organization
- Ref. Donor's Name & Designation
- Attn: Jack Pollock, PPHK & Associates
- Tel: (423) 752-3650