



Stock Donation Form / The Montessori School

Thank you for your interest in donating stock to The Montessori School.
Please follow these two steps when donating a gift of stock.

STEP 1 Contact your broker to communicate stock transfer instructions, or obtain a charitable gift transfer form from your online trading account. You will need to communicate or reflect the Name of Stock, Ticker Symbol and Number of Shares to be donated to The Montessori School and provide the following information:

Name of Broker: PNC Investments, LLC

Account Name: The Montessori School

Account Number: 005-331640

DTC #: 0226

TMS Tax ID #: 23-1726671

Broker Mailing Address: PNC Investments, 1600 Market St, Floor 10, Phila PA 19103

Broker Contacts: Jason Korff, 215-665-4903; Will Mills, 216-222-5132

STEP 2 Fill out the following and mail to TMS, 1701 Jarrettown Road, Dresher PA 19025, Attn: Development Office. This will ensure that your gift is properly documented.

Name of Donor _____

Donor Address _____

Broker Name / Phone Number _____

Name of Stock _____ Number of Shares and approximate value _____

Transfer Date _____

What fund is this gift designated for? _____ Is this a pledge payment? Yes No

Signature _____ Date _____

Thank you for your support!

Questions? Please call the Development Office, 215-542-0740, or email development@themontessorischool.us.