



## St. Albans School

Updated October 2025

### Gift of Securities to St. Albans School

Thank you for your interest in making a gift of securities to St. Albans School. St. Albans School is a division of the Protestant Episcopal Cathedral Foundation (PECF), the single legal entity.

Before transferring your gift please alert [giftofstock@cathedral.org](mailto:giftofstock@cathedral.org) , [bnusman@stalbansschool.org](mailto:bnusman@stalbansschool.org) and [cynthia\\_pierce@ml.com](mailto:cynthia_pierce@ml.com) (receiving broker) that a gift is being transferred, as donated stock that arrives in our account without identification may delay the issuance of a tax-deductible receipt. You may also sign your gift letter with your legal signature/s, and communicate your intention to St. Albans Development Office by mailing or faxing copies of the letter to the STA development office (see below).

#### Important: In your email alert, please include:

1. The donor's name
2. The name, ticker symbol, and number of shares of the stock being donated
3. The allocation of the gift i.e. Annual Giving, endowment, capital campaign, or for a specific area such as financial aid, etc.
4. Please also indicate if the gift is to be allocated amongst other PECF divisions
5. The mailing address of the donor for issuance of tax receipt

Please provide the following information to your broker in order to make the stock transfer:

1. Merrill Lynch
2. DTC: 8862
3. Beneficiary Account Number: SUP-02253
4. Beneficiary Name: Protestant Episcopal Cathedral Foundation/STA
5. Originator to Beneficiary Information: Donor Name

Please note that gifts received after December 31 will be treated as a gift in the following calendar year for tax deductible purposes.

#### Contact one of these individuals for further account information for your transaction:

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