



# Boston Preparatory Charter Public School

## Stock Donation Form

### Donate Stock

A charitable gift of stock provides an opportunity for tax savings while generously supporting Boston Preparatory Charter Public School. **Thank you!**

**Please note:** Consult with your tax advisor for definitive valuation information.

Electronic delivery of stock shares is the most secure and expedient delivery process available and provides efficient internal control as well as cost savings. However, you may also directly transfer stock certificates.

### Notification of Donor Intent

Regardless of the method chosen to deliver a gift of stock, the donor or the transferring broker must, for audit and acknowledgement purposes, provide the following information:

- Donor's name and complete address
- Name and number of securities transferred
- Broker's name and complete address

You may use the **Stock Donation Form** (attached), provide a letter, use your broker's stock power, or send an e-mail to communicate this information at time of transfer.

### Securities Delivered Electronically

The following information will enable your broker to facilitate an electronic transfer of stock:

Brokerage Firm: Lehman Brothers  
Agent: John Hage  
Contact Phone Number: (617) 342-4242  
DTC Number: 0074  
Account Number: 834-76494-13-284  
Account Name: Preparatory Foundation, Inc.  
Tax ID: 11-3690799

### Securities Delivered by Mail

You can forward your stock certificate(s) directly to **the Preparatory Foundation, Inc. c/o Boston Preparatory Charter Public School**. Mail your **unendorsed** certificate(s) and stock donation form via Registered Mail, in **separate** envelopes to:

**The Preparatory Foundation, Inc.**  
**c/o Boston Preparatory Charter Public School**  
Attn: Meghan Blute-Nelson  
1286 Hyde Park Ave.  
Hyde Park, MA 02136  
Phone: 617-333-6688 ext. 17  
Fax: 617-333-6689  
Email: [mblute-nelson@bostonprep.org](mailto:mblute-nelson@bostonprep.org)

We recommend that you send the certificate(s) via Registered Mail and alert us they have been sent.



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## Stock Donation Form

Please print, fill out, and fax or mail to:

**The Preparatory Foundation, Inc.**  
**c/o Boston Preparatory Charter Public School**  
Attn: Meghan Blute-Nelson  
1286 Hyde Park Ave.  
Hyde Park, MA 02136  
Phone: 617-333-6688 ext. 17  
Fax: 617-333-6689

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### Donor Information

Name: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_ Evening Phone: \_\_\_\_\_

Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

I would prefer for my gift to be:  Recognized  Anonymous

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### Securities Gifted

Date of Transfer: \_\_\_\_\_

1. Number of Shares: \_\_\_\_\_ Name of Security: \_\_\_\_\_

2. Number of Shares: \_\_\_\_\_ Name of Security: \_\_\_\_\_

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### Transferring Broker

Contact Name: \_\_\_\_\_ Brokerage Firm: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

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### Authorization

\_\_\_\_\_  
Owner / Donor (please print)

\_\_\_\_\_  
Owner / Donor (please print)

\_\_\_\_\_  
Signature of Owner / Donor

\_\_\_\_\_  
Signature of Owner / Donor

*Boston Preparatory Charter Public School (BPCPS) utilizes rigorous curriculum, extended academic time, and a range of supports for children and families to prepare 6<sup>th</sup>-12<sup>th</sup> grade students to succeed in college. An environment structured around scholarship and personal growth cultivates students' virtues of courage, compassion, integrity, perseverance, and respect. Please visit us at [www.bostonprep.org](http://www.bostonprep.org).*