



FRIENDS SCHOOL OF PORTLAND

inquiry • reflection • action

GIFTS OF STOCK

The following information is provided to assist individuals and estate planning professionals in making charitable gifts of stock to Friends School of Portland.

Proper Designation for Gifts: Friends School of Portland

Address: 1 Mackworth Island
Falmouth, Maine 04103

Tax Information: EIN: 20-3299655
Friends School of Portland is a nonprofit organization, as defined under section 501(c)(3) and 170(b)(1)(A)(ii) of the Internal Revenue Code.

To transfer stock: If your security is held in a brokerage account, your stockbroker will be able to transfer stock electronically from your account to the school's account. Friends School of Portland maintains an account with Scottrade, a brokerage with offices throughout the nation. Use the following numbers to make the transfer:

DTC routing number: 0705

Account number: 33393380

Please note that Scottrade does not notify the school of stock transfers and does not know the donor source. Please notify the school of your donation in facilitate proper acknowledgement and transfer of funds to the school.

If you hold the stock in certificate form, please first deposit the certificate with your brokerage firm and then request a charitable gift transfer using the information above.

For more information: James Grumbach
207-781-6396
james@friendsschoolofportland.org

A taxpayer who itemizes deductions may be entitled to an income tax deduction for a charitable contribution. Before giving securities, you should obtain advice from your tax and financial advisors.

An independent Quaker day school for preschool-8th grade

www.friendsschoolofportland.org ~ 207-781-6321 ~ 1 Mackworth Island, Falmouth, ME 04105