

Charlotte Lab School would be happy to discuss your interest in making a stock contribution to the School. Please refer to the stock transfer instructions (see below) or contact Susannah Lund, Head of External Affairs, with any questions. It is also recommended that every donor who is considering a gift of securities speak with a financial advisor for the best options for stock gifts and consult with a tax advisor for more information regarding the deductibility of a gift of stock.

Stock Transfer Instructions

Your support and generosity are greatly appreciated, and we would like to thank you for making Charlotte Lab School a part of your charitable giving. The following information is needed for transferring gifts of stock directly to Charlotte Lab's brokerage account at Wells Fargo Advisors.

Broker:	Wells Fargo Advisors
DTC #:	0141
Account #:	2422-6853
Account Name:	Charlotte Lab School
Tax ID #:	47-1006252

Once you are ready to transfer your stock, please email Susannah Lund at slund@charlottelabschool with the name, type/number of shares of stock, and the purpose of the gift (i.e. unrestricted, restricted, special project) so that we may attribute and acknowledge the gift promptly and appropriately. Donor identification is protected by law; therefore, Lab's account executive has no way of knowing the identity of the donor of a stock gift and is unable to provide us with the donor's name.

Please note that Charlotte Lab School does not retain donated stock. Immediately upon receipt notification said securities will be sold. According to Charlotte Lab School's policy and as required by the IRS, gifts of stock will be valued based upon the average of the high and low trading price on the date the gift was received by the School.

Charlotte Lab School is recognized by the U.S. Internal Revenue Service as a 501(c)(3) tax-exempt nonprofit organization. Contributions to Lab are tax-deductible to the extent provided by U.S. law. Please consult your tax advisor for more information regarding the deductibility of your stock gift. Should you have any further questions, please feel free to call us at (704) 464-3830.

Thank you for supporting Lab!

