



# MOUNT VERNON

## Stock Transfer Instructions

1. **Essential:** Please notify Mount Vernon by submitting your intention to transfer stock via our online Securities Transfer Notification Form. *NOTE: When stock is transferred to our account we are NOT notified of the sender and this form prevents us from having to return transferred stock.*
2. If the stock is in a brokerage or trust account
  - a. Instruct your stockbroker/ banker to transfer the stock you wish to donate to:  
  
Wells Fargo Advisors  
Account number: 2883-6122  
The Mount Vernon School  
DTC #: 0141
  - b. The Mount Vernon School's Federal Tax ID. Number: **58-205-4415**
3. If the gift is in the form of a stock certificate registered in your name, please send the following:
  - a. The stock certificate(s).
  - b. Separately, a signed Stock Power (found on the next page). Mailing the Stock Power and the certificate under separate cover ensures that the stock can only be transferred if the finder has both documents.

Addressed to:  
Wells Fargo Advisors  
ATTN: Mount Vernon xxxx6122  
2520 Northwinds Pkwy – Ste 200  
Alpharetta, GA 30009

# Stock or Bond Power

Sub Firm #	BR Code	FA Code	Account Number
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

(Office Use Only)

**IMPORTANT: READ CAREFULLY** – The signature(s) to this power must correspond with the name(s) as written upon the face of the certificate(s) or bond(s). If the signature does not match the registration on the face of the certificate, the signer must disclose their capacity in which they are signing.

**FOR Deposit into street name, the undersigned does (do) hereby sell, assign, and transfer:**

**If Stock, Complete This Portion.**

**Stock Description:** \_\_\_\_\_  
**Class:** (Common, PFD, Class A) \_\_\_\_\_ **Number of Shares:** \_\_\_\_\_  
**Certificate No(s):** \_\_\_\_\_  
**Inclusive standing in the name of the undersigned on the books of said Company.**

**OR**

**If Bonds, Complete This Portion.**

**Bond Description:** \_\_\_\_\_  
**Principal Amount \$** \_\_\_\_\_, **Certificate No(s):** \_\_\_\_\_  
**Inclusive standing in the name of the undersigned on the books of said Company.**

**CLIENT AUTHORIZATION AND CAPACITY IS REQUIRED IF NOT SIGNED BY CURRENT REGISTERED OWNER**

- The undersigned does (do) hereby irrevocably constitute and appoint our clearing agent, Wells Fargo Clearing Services, LLC attorney to transfer the said stocks or bond(s), as the case may be, on the books of said Company, with the full power of substitution in the premises.
- Capacity must be typed or written.

Signature of current owner and Capacity, if applicable <b>X</b>	Print Name	Date
Capacity, (examples: Executor, Trustee, Survivor, Custodian, Heir)		
Signature of current owner and Capacity, if applicable <b>X</b>	Print Name	Date
Capacity, (examples: Executor, Trustee, Survivor, Custodian, Heir)		

**Return Original Completed Documents to Physical Processing at H0006-094.**

**Office Use Only - Client Identification/Signature Validation**

<p><b>(Check one of the four Validation Options)</b></p> <p>1. <input type="checkbox"/> Client Personally Known to Me</p> <p>2. <input type="checkbox"/> Validated Government-Issued Photo ID (when client is present)</p> <p>3. <input type="checkbox"/> Compared signature to imaged documents.</p> <p>4. Verbally confirmed two of the following (when client is not present):</p> <p><input type="checkbox"/> Social Security Number or Tax Identification Number</p> <p><input type="checkbox"/> Date of Birth</p> <p><input type="checkbox"/> Home Telephone Number</p> <p><input type="checkbox"/> Recent Account Activity</p>		<p><b>Signature Guarantee</b></p>	
<p><b>I certify that I validated the client's identity and/or signature via the method indicated above. I further certify that the client has the authority to execute the transaction.</b></p>			
Name (Print)	Signature <b>X</b>	Date	

**Investment and Insurance Products are:**

- **Not Insured by the FDIC or Any Federal Government Agency**
- **Not a Deposit or Other Obligation of, or Guaranteed by, the Bank or Any Bank Affiliate**
- **Subject to Investment Risks, Including Possible Loss of the Principal Amount Invested**

Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC, a registered broker-dealer and non-bank affiliate of Wells Fargo & Company.