

ELECTRONIC TRANSFER OF STOCK

Thank you for your recent inquiry about gifts of stock to Montessori School of Lake Forest. Making a gift of stock to MSLF is a relatively simple process.

1. Notify your broker that you wish to make a stock transfer from your account to the account listed below:

Broker: Wintrust Wealth Management
959 S. Waukegan Road
Lake Forest, IL 60045

DTC Number: 0141

MSLF Account No: 4946 9663

Beneficiary: Montessori School of Lake Forest

Account Rep: Allison Stewart, Registered Financial Associate
Phone: 847-482-8444
Toll-Free: 877-346-3391
Fax: 855-548-1436
astewart@wintrustwealth.com

2. We ask that you also notify us of your stock transfer so that we may appropriately credit and acknowledge your generosity. Please include the following information:
 - Name of stock transferred
 - Number of shares
 - Copy of brokerage firm stock transfer instructions
 - Approximate date of transfer
 - How you would like your gift to be used

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