

## 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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