

NATIVITY PREP ACADEMY

Instructions for Donating Stocks (Securities)

Thank you for your interest in donating stock to Nativity Prep Academy. Your support of our mission changes the trajectory of our students and their families, breaking the cycle of poverty. Electronic delivery of stock shares is the most secure and expedient delivery process available and provides efficient internal control as well as cost savings.



TO HELP FACILITATE A GIFT OF STOCK, PLEASE USE THE FOLLOWING INSTRUCTIONS:

1. Contact your broker with your donation intentions.
2. Provide the following information to your broker to facilitate the securities transfer:

Receiving Account Information

- Account Firm: Pershing, LLC
- Account DTC: 0443
- Account Address: Pershing LLC, One Pershing Plaza, Jersey City, NJ 07355
- Account Phone: 888-367-2563
- Account Title: Nativity Prep Academy of San Diego
- Receiving Registration: Non-Profit Organization
- Account Number: J3W021195
- Account Tax ID: 33-0886247

3. Please notify Nativity Prep Academy by emailing Kevin Kacvinsky (kkacvinsky@nativityprep.org). Kindly attach the Stock Donation Notification Form or provide the following information:

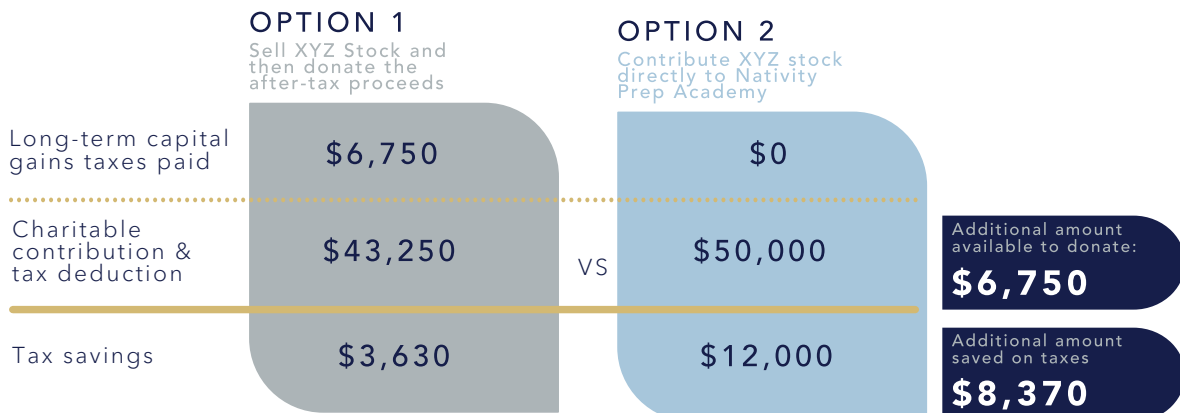
- A description of the securities to be donated
- The number of shares
- Your name, address, and phone number

ILLUSTRATED EXAMPLE OF THE BENEFITS OF DONATING APPRECIATED ASSETS:

Assumptions:

- Original cost (cost basis) of stock \$5,000
- Federal long-term capital gains tax rate: 15%

Fair Market Value of XYZ Stock
\$50,000



This is a hypothetical example for illustrative purposes only. The example does not take into account state and local taxes or the Medicare net investment income surtax. The tax savings shown is the tax deduction, multiplied by the donor's tax rate (24% in this example), minus the long term capital gains tax paid. Source: Schwab Charitable

Please note that submitting this form will not initiate the transfer of securities to Nativity Prep's Account. As the Donor, you are responsible for initiating the transfer through your broker/dealer or online trading platform. Nativity Prep Academy is a 501(c)(3) nonprofit. Donations are deductible as allowed by law (EIN: 33-0886247)

NATIVITY PREP ACADEMY

Stock Donation Notification Form



Donor Information

Donor's Name _____

Donor's Address _____

Street _____

Street _____

City _____ State _____ Zip _____

Donor's Phone _____ Phone Type _____

Donor's Email _____

Information About Your Donation

Stock/Security Name _____

Stock/Security Symbol _____

Number of Shares Donated _____

Total Estimated Value of Donation _____

Estimated Date of Transfer of Shares _____

EMAIL YOUR DONATION FORM TO: kkacvinsky@nativityprep.org

HARD COPIES MAY BE SENT TO: Nativity Prep Academy of San Diego, Inc.
6126 Adelaide Avenue, San Diego, CA 92115



TO SCHEDULE A TOUR:

Brian Hickey
Assoc. Director of Development
bhickey@nativityprep.org
(858) 232-8293

FOR QUESTIONS REGARDING SENDING YOUR GIFT:

Kevin Kacvinsky
Director of Development
kkacvinsky@nativityprep.org
(619) 636-4200