



**STOCK TRANSFER TO CAIS  
SAMPLE LETTER**

**Occasionally the school receives unidentified stock transfers: PLEASE BE SURE TO NOTIFY THE SCHOOL ABOUT YOUR GIFT TO AVOID DELAYS AND TO ENSURE PROPER CREDIT.**

Questions? Contact Esther Lee in the Advancement Office, 415-861-7166 or [e\\_lee@cais.org](mailto:e_lee@cais.org).

**Chinese American International School**  
Attn: Ina Stahl, Business Office  
150 Oak Street  
San Francisco, CA 94102

Fax: 415-861-2829  
Phone: 415-861-7666  
Email: [i\\_stahl@cais.org](mailto:i_stahl@cais.org)

**Date:** \_\_\_\_\_

**To:** \_\_\_\_\_ (Your brokerage company name)

\_\_\_\_\_ (Address)

**Attn:** \_\_\_\_\_ (Contact person & phone number)

**Re: GIFT OF SECURITIES** Please accept this letter as authorization to gift

\_\_\_\_\_ of \_\_\_\_\_  
(Number of Shares) (Name of Security)\*\*\*

Credit to: Chinese American International School (tax identification number: 94-2786958)  
Schwab Account # 2288-9890  
DTC # : 0164 Code 40

Designation of the gift: Annual Fund

\_\_\_\_\_ (Client Account Title)

\_\_\_\_\_ (Client Account Number)

Sincerely,

\_\_\_\_\_ (Signature)

\_\_\_\_\_ (Second signature)

\_\_\_\_\_ (Print Name)

\_\_\_\_\_ (Print Name)

\_\_\_\_\_ Telephone number

\_\_\_\_\_ Email

\*\*\* \_\_\_ (NO) \_\_\_ (YES) These shares are restricted and/or I am an insider of this company.