

Thank you for your interest in donating appreciated securities to Pleasanton Parnterships in Education Foundation (PPIE)!

In order to make a donation of this type, please complete the following steps:

1. Email PPIE at mail@ppie.org with: the date, the number of shares, and the symbol of your security. We will reply with our Account and DTC information so you can make the transation.
	1. Sometimes information about who made the donation is disconnected from the actual transfer, so if you let us know you are requesting a transfer we can be looking for it. Please also let PPIE know if you want your gift to be anonymous.
	2. If you wish your gift to be associated with a certain funding priority, please contact us and we will be happy to discuss. Please visit the Funding pages on our website at [www.ppie.org](http://www.ppie.org) to learn more about how we support Pleasanton schools.
2. Place instructions with your brokerage service. Either use your brokerage service’s form or write a letter (see sample below) to your brokerage service asking that the securities be transferred to our brokerage account (using the Account and DTC numbers we provde). Sometimes, end of year securities transfers may be delayed due to high volumes, so it’s best to arrange as soon as possible.

When your tranfer is complete, notify PPIE. PPIE will then immediately (within 2 business days) sell the security and record the gift after the transaction clears. As soon as we have recorded the gift, which may take a few days, you will receive a tax receipt indicating the average price on the day of the transfer to be used for tax purposes.

By giving to PPIE, you join with the thousands of other PUSD families who together provide funding to transform our schools for our kids. Your contribution will help preserve a truly outstanding public education for all Pleasanton schools. Thank you!

*<This is an example of a letter to your broker>*

*<Your Broker Name and Address*>

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RE: Your Account # \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Dear \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

This letter is your authorization to immediately transfer by DTC from the above referenced account the following:

\_\_\_\_\_\_ shares of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (ticker/cusip: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)

To: LPL Financial account # (to be provided by PPIE)

LPL Financial DTC # (to be provided by PPIE)

LPL Financial account name: Pleasanton Partnership In Education Foundation

This transfer is being made as a charitable gift to registered 501(c)(3) Pleasanton Partnership in Education Foundation (PPIE), tax ID #94-3046738. Please contact me at ( ) \_\_\_\_\_\_\_\_\_\_\_\_ to confirm receipt of this request.

Please ensure that you also send my name with the transfer, so that Pleasanton Partnership in Education Foundation (PPIE) can properly issue a tax receipt for the gift of securities.

Thank you for your assistance.

Sincerely,

Date: