



**MENLO PARK-ATHERTON EDUCATION FOUNDATION ENDOWMENT**

***Stock Gift Transfer Instructions***

***For Endowment Contributions only***

Dear Friend of the MPAEF Endowment:

If you wish to donate stock to the Menlo Park-Atherton Education Foundation Endowment, please instruct your broker to transfer shares directly to the Endowment's account at Charles Schwab:

Charles Schwab & Co., Inc.  
DTC: 0164, code 40  
Account Name: MPAEF Endowment  
Account Number: 1167-3088

**To ensure that your transaction is properly acknowledged, please also contact both of the people below via letter, fax, phone or email with the following information: (1) the date of your request, (2) the name of the stock, and (3) the number of shares you intend to donate:**

**MPAEF Broker: Lena Chance**  
Charles Schwab & Co., Inc.  
800 El Camino, Suite 100  
Menlo Park, CA 94025  
Phone: (650) 614-2024  
Fax: (650) 614-2010  
Email: [lena.chance@schwab.com](mailto:lena.chance@schwab.com)

**MPAEF Endowment Co-Chair: Peg Phelps**  
P.O. Box 584  
Menlo Park, CA 94026-0584  
Phone: (650) 327-0567  
Email: [pphelps@stanfordalumni.org](mailto:pphelps@stanfordalumni.org)

The MPAEF Endowment will provide you with all necessary tax documentation in a timely manner. If you don't receive this documentation, please let us know so that we can be sure that the transfer has occurred and been credited properly to you in our records. If you have any questions regarding your stock donation, please feel free to call or email Peg Phelps as noted above.

Thank you very much for your generous support of the Endowment--and all the students in our schools!