



Transferring Securities to Columbus Academy

Avoid capital gains tax and receive a tax deduction while making an immediate impact on the daily Academy experience for our faculty, staff and students.

Transferring shares of appreciated securities directly to Columbus Academy might be an advantageous way for your family to support the school. Your tax-deductible gift amount is the average price of the securities on the day the transfer is made.

How to Proceed

- Contact your broker to request a transfer of securities to Columbus Academy's Charles Schwab account. Your broker will need the following information:

Charles Schwab transfer line: (800) 435-4000

DTC # 0164

Columbus Academy Account # 8790-2632

Columbus Academy Federal Tax ID # 31-4379445

Our office is happy to work with you or your advisor on making your gift possible. Please contact Maria Miller, JD, at (614) 475-2311 or millerm@columbusacademy.org to talk.

Donors should consult with their attorney and/or tax advisor to determine the most advantageous giving strategies for their personal circumstances.

Planning tips

When securities are transferred, your name is not automatically provided with the transfer information. It is important to contact us to ensure proper recording of your gift.



**Columbus
Academy**

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(614) 475-2311

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