



HOW TO TRANSFER SECURITIES

A way for donors to support Columbus Academy while avoiding capital gains tax and receiving a tax deduction.

Transferring shares of appreciated securities directly to Columbus Academy might be an advantageous way for your family to support the school, and it only takes two easy steps:

Step 1: Contact your broker to request a transfer of securities to Columbus Academy's Charles Schwab account. The tax deductible gift amount is the average price of the securities on the day the transfer is made. 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

Step 2: When securities are transferred, your name is not automatically included with the transfer information. Please advise us of your transfer to ensure proper gift recording and recognition. You can reach Emily Campbell, Director of Development, at:

Ph: 614.509.2256
Email: campbelle@columbusacademy.org

Thank you for supporting Columbus Academy!