



Steps for Gifting Appreciated Stock

Step 1 Contact Landmark

Contact Martin J. Riggs, Senior Director of Giving and Alumni Relations at 770-692-6758, mriggs@landmark-cs.org, or Sharon Dickson, Advancement Assistant at 770-692-6777.

Please provide them with the following details:

- Name of securities to be gifted
- The approximate number of shares or dollar amount of gift
- Name of delivering firm

Step 2 Contact your personal investment advisor or broker

Provide your advisor with the following delivery instructions:

- DTC# 0226 National Financial Services
- Account GBK062377 (Principal Securities, Inc) for Landmark Christian School
- Broker Name: Charles E. McDaniels
- Address to send securities: National Financial Services, LLC

100 Crosby Parkway, mail zone KC1H-PSI
Covington, KY 41015

888-774-6267

Step 3 Ask your broker to call our broker

Ask your broker to contact Charles McDaniels, 770-461-2298 (office) or 770-403-4076 (cell) at McDaniels Financial Services, LLC. Please share with him when he should expect to receive the transfer of the shares into the Landmark account. This will enable Landmark Christian School personally to acknowledge your gift and send a gift receipt for tax purposes. (If you intend for your gift to go to the Landmark permanent endowment account and have discussed this desire and permanent restriction fully with Mr. Riggs, the DTC will be the same as in Step 2, above, but the account number will be MDP 005718 (Principal Securities, Inc), also for Landmark Christian School.