



Steps for Gifting Appreciated Stock

Step 1 - Contact Landmark Christian School to confirm gift details

Contact(s):

- Martin J. Riggs, Chief Generosity Officer, at 770-692-6758, mriggs@landmark-cs.org
- Sharon Dickson, Manager of Advancement Services, at 770-692-6777

Details Needed:

- Name of specific securities to be gifted
 - The approximate number of shares or dollar amount of gift
 - Name of delivering firm
 - Reminder of the purpose of the gift
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Step 2 - Contact your investment advisor

- Provide the same details in Step 1 to your investment advisor
 - Ask your advisor to contact Landmark's advisor, AdvisorySouth, LLC for exact gift instructions:
 - Speak with Tracy Stanley, (678) 990-6517 (office) or (770) 490-5432 (cell)
 - Communicate a date on which the transfer of shares will occur
 - Ask your advisor to confirm with you once the transaction has been completed
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Step 3 - Rest easy

- Landmark will apply your gift as intended and will thank, report, and celebrate with you regarding your impact on students! The school will also provide a gift receipt for the IRS.

Classification: Customer Confidential