

Instructions for Transferring Stock to Athena Academy

Your broker may electronically transfer your donation to our account at Merrill Lynch.

Stocks, bonds and ETFs - DTC #8862 to Athena Academy account # 736-02437

Mutual Funds - DTC #0671 to Athena Academy account # 736-02437

Merrill Lynch

4802 Deer Lake Drive East
Jacksonville, FL 32246

Contact at Athena Academy: Jo Mutch

Telephone (650) 543-4560

Email: Jo@AthenaAcademy.org

Contact at Merrill Lynch: Joshua Calisti, CFP

Telephone: (561) 650-7390

Email: joshua.calisti@ml.com

It is very important that you or your broker call Athena Academy or email Jo@AthenaAcademy.org to advise us that your donation is being transferred to our account. *Stock gifts arrive electronically in our account without any accompanying donor identification.*

Please include your preferred mailing address so that we may promptly send you a letter of appreciation and your official tax document which will include the name of the stock donated, the number of shares, and the fair market value of the stock on the date it was received in our account.

If you need assistance, please call Jo Mutch at 650-543-4560.

Thank you for your support of Athena Academy!