



Making a Gift to The Berkeley School

We are so grateful for your support—it truly makes a difference!

You may give to The Berkeley School through **mailed contributions**, **gifts of stock**, **donor-advised funds**, **IRA distributions**, or **wire transfers**. Below are general instructions for initiating these types of contributions. If you need any further assistance or have questions, please don't hesitate to let us know.

Mailed Contributions

All mailed contributions should be made payable to The School and mailed to:

The Berkeley School
c/o Advancement Office
1310 University Avenue
Berkeley, CA 94702

***Please note "TBS Fund" in the memo line. This includes checks from donor-advised funds, IRAs, and family foundations. Thank you!

Stock Gifts

Gifts of stock should be transferred via the DTC system using the following account information: **Charles Schwab**

DTC Number: 0164

DTC Code: 40

Name on Account: The Berkeley School

Account #1530-5765

***Please include the keyword "DONOR" and the donor's full name in the transfer comments to ensure proper acknowledgment. Thank you!

Mutual Fund Shares

Mutual fund shares require additional processing details. Please contact us at tbsfund@theberkeleyschool.org or call 510.665.8800 to initiate a gift of mutual funds.

Tax Benefits of Securities Donations

Donating appreciated securities may provide federal income tax savings and help you avoid capital gains tax on the increase in value. Please consult with your financial advisor for personalized guidance.

The School's Federal Tax ID is: 94-1571768

Wire Transfers

For wire transfers, please connect with us in advance at tbsfund@theberkeleyschool.org or call 510.665.8800 so we can properly track and acknowledge your gift. Thank you!

Beneficiary: "The Berkeley School"

Beneficiary Address: 1310 University Avenue, Berkeley, CA 94702

Bank Information/Bank Name: Bank of Marin

Bank Address: 504 Redwood Blvd, Suite 100, Novato, CA 94947

Routing/ABA #:121141877

Account #: 13301817

***Please include "TBS Fund" in the memo line. Thank you!