



CAPE FEAR ACADEMY

Securities DTC Instructions

Thank you for your interest in transferring a stock gift to Cape Fear Academy. To ensure accurate processing of the gift, please provide the following by e-mail to Melissa Blackmon, Director of Advancement, at melissa.blackmon@capefearacademy.org:

1. Donor's name
2. Name of the securities
3. Number of shares
4. Gift allocation (if known)

Direct a free transfer of securities to:

Client Name: Cape Fear Academy

Client's Schwab Account Number: 9077-1850

DTC Clearing 0164, Code 40

Cape Fear Academy's Tax ID: 56-6075566.

Mailing address: 3900 S. College Road, Wilmington, NC 28412

Note: If you would like to transfer LP or LLC securities, foreign stock or physical certificates, or have a question about your transfer, please contact Meredith Koenig with Lumina Wealth Management. Her firm manages these transactions for the school.

Rachel Moore, Lumina Wealth Management
910.599.9409
rmoore@luminawm.com

Do not send cash using these instructions. To wire or transfer cash, please contact Melissa Blackmon, Director of Advancement, at 910-218-7192.