



## CAPE FEAR ACADEMY

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 at [melissa.blackmon@capefearacademy.org](mailto: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.

Meredith Koenig, Lumina Wealth Management  
910.599.9409  
[mkoenig@luminawm.com](mailto:mkoenig@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.