



YELLOWSTONE. FOREVER.

THE CAMPAIGN FOR YELLOWSTONE SCHOOLS

WAYS TO GIVE

As you thoughtfully consider your pledge to **Yellowstone Schools**, please consider the following options to fund your commitment:

- Cash
- Appreciated securities
- 401k or IRA required minimum distributions
- Donor-Advised Fund
- Life Insurance Gift
- Retirement Plan Gift

We are stewards of our students today and in the future. We are caretakers for a brief period, given time, energy, and resources. What we do with these gifts defines the character of our life and the depth of our spiritual understanding.

Consider what you feel passionate about. Through your gift, not only will our community be enriched, your life will be too!



SCHOOL INFORMATION

Legal Name (payable to):

Yellowstone Academy
3000 Trulley Street
Houston, TX 77004

Federal Tax ID / FEIN:

76-0686870

Phone Number

(713) 741-8000

Email Address:

advancement@yellowstoneschools.org

For questions and tax advice, we encourage you to seek guidance from a trusted professional advisor such as an attorney, accountant or broker.



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MAKING A GIFT OF APPRECIATED SECURITIES TO YELLOWSTONE SCHOOLS

When transferring a gift of appreciated securities to Yellowstone Schools, please send through the school's brokerage account with **US Capital Advisors, NFS** **Account Number HSQ-017090**.

- Please contact Doug Masterson at US Capital Advisors, LLC at 713-343-0640
- Prior to receipt by US Capital, please notify Yellowstone by submitting our online form at <https://yellowstoneschools.org/give/stock/>
- The date the stock is received in Yellowstone's DTC account [0226] is the date of the gift.
- In accordance with IRS regulations, Yellowstone Schools calculates the fair market value of stock gifts for internal purposes only. Please consult with your tax professional to value your gift for your records.
- The securities will be sold no later than the next business day following date of receipt.
- If you have any questions about this transaction, please call Doug Masterson with US Capital Advisors at 713-343-0640 or Amy Tanner at 713-741-8000.

Thank you for your gift to Yellowstone Schools!





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COMMITMENT

I/We are pleased to commit \$_____ to the **Yellowstone. Forever.** Campaign.

I/We will fulfill this pledge no later than June 30 ☐ 2022 ☐ 2023 ☐ 2024

I/We will fulfill this pledge with (please check one):

- ☐ a gift of securities
- ☐ by check
- ☐ by credit card
- ☐ by donor-advised fund

I/We will make payments as follows:

- ☐ In one payment on or around _____.
- ☐ Payments of \$_____ ☐ Annually ☐ Quarterly ☐ Monthly
beginning on _____.
- ☐ Please send payment reminders.

RECOGNITION

☐ Our names may be published by or for the benefit of Yellowstone Schools in this manner (please use exact words and punctuation):

☐ I/we wish to remain anonymous.

☐ I/we wish to make this gift (circle one) in honor/memory of _____,
who (circle one) may/may not be published by or for the benefit of Yellowstone Schools.

Name(s): _____

Signature: _____ Date: _____

Your gift is valuable to our mission and our students, and we sincerely appreciate your support!