



**Buckingham Browne & Nichols School**  
80 Gerry's Landing Road, Cambridge, MA 02138

(617) 800-2788

fax (617) 868-7295

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### **Securities Transfer Instructions**

The preferred and quickest method of transfer is to have your broker initiate an electronic transfer to BB&N's Salomon Smith Barney (SSB) account. If you are giving Mutual Funds, please have your broker contact SSB to inquire *if* they are able to receive and sell your specific Mutual Fund.

Your broker needs to know (and may request in writing):

- **Type and number of securities to be given (example: 100 shares of IBM)**
- **DTC #:** **418**
- **BB&N's Account #:** **354-23439-12**
- **BB&N's Federal Tax ID:** **04-2103751**
- **Contact at SmithBarney:** **Katherine Evangelista 617-589-3371**  
**[Katherine.R.Kelliher@smithbarney.com](mailto:Katherine.R.Kelliher@smithbarney.com)**

In order to evaluate the gift and to make certain that we credit the appropriate shares to you, ***please forward the following information*** to Marney Hupper in the External Affairs Office at [marney\\_hupper@bbns.org](mailto:marney_hupper@bbns.org) or 617-800-2788.

- **Type and number of securities to be given**
- **Your broker's name, company, and telephone number**
- **Approximate value of the gift**
- **Anticipated date of the gift**
- **Designation of gift (Annual Fund or Capital Gift)**

The gift will be valued on the day that the securities are received into BB&N's account. The mean market value on that day is used to determine the value of the gift for tax purposes.

If you have further questions, please contact Marney Hupper, Director of Advancement Programs, at 617-800-2788.

Thank you for your support of BB&N.