



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

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: Christine Somers or Vincent M. Capolupo**
617-589-3414 or 3424
christine.somers@morganstanleysmithbarney.com
vincent.m.capolupo@morganstanleysmithbarney.com
FAX: 617-589-3287

In order to evaluate the gift and to make certain that we credit the appropriate shares to you, ***please forward the following information*** to Meg Macri in the External Affairs Office at meg_macri@bbns.org or 617-800-2724; FAX: 617-924-1501.

- **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 about your gift to BB&N, please contact Jo-Ann Lovejoy, Director of Annual Giving, at 617-800-2723 or Janet Rosen, Director of Capital Programs, at 617-800-2729.

Thank you for your support of BB&N.