

STOCK AND MUTUAL FUNDS TRANSFER INSTRUCTIONS

If you are interested in making a gift of stock to WBUR, follow the below instructions. It is important to contact Sydney Campbell at (617) 358-2340 or sydneycc@wbur.org to ensure your gift is properly designated to WBUR.

IF THE SECURITIES ARE REGISTERED IN BOOK FORM/STREET NAME AT YOUR BROKER:

The gift of securities can be transferred to the Boston University account by providing the following transfer instructions to your broker *exactly as follows*:

The Northern Trust Company
DTC clearing #2669 for further credit to: account #26-46112
Account Name: Trustees of Boston University
Designation: For benefit of WBUR
Boston University EIN: 04-2103547
Gift date is the date of receipt in Boston University's account

IF THE SECURITIES ARE HELD AS PHYSICAL CERTIFICATES IN YOUR NAME:

You should send the stock certificate(s) along with a transmittal letter by certified mail to the following address:

University Development and Alumni Relations
595 Commonwealth Avenue, Suite 700
Boston, MA 02215
Attn: Cindy Gould, Associate Director of Gifts

You should also sign the backside of the stock certificate or an irrevocable stock power transferring ownership to the Trustees of Boston University. The signature on the stock power *must be guaranteed* by an eligible guarantor institution such as a commercial bank, trust company, securities broker dealer, credit union or savings institution participating in a STAMP Medallion program approved by the Securities Transfer Association, Inc.

Gift date is the postmark date as mailed to Boston University

IF YOU INTEND TO TRANSFER MUTUAL FUNDS

The gift of securities can be transferred to the Boston University account by providing the following transfer instructions to your broker *exactly as follows*:

State Street Brokerage Services, Inc.
DTC clearing #0226 National Financial Services (NFS) for further credit to: account #AB2 864366
Account Name: Trustees of Boston University
Boston University EIN: 04-2103547
Gift date is the date of receipt in Boston University's account

Most mutual funds can be transferred directly to our State Street broker. Your broker should contact the following person at State Street Brokerage to assist with the transfer of Mutual Funds:

Fred Menis: 617-664-6278
Gift date is the date of receipt in the State Street Brokerage House Account

IF YOU INTEND TO TRANSFER GOVERNMENT BONDS

Government bonds should be transferred to the Boston University Northern Trust account by providing the following instructions to your broker: Send to The Northern Trust Company Northern

Northern CHGO/TRUST

ABA # 071000152

Trustees of Boston University - account #26-46112

Gift date is the date of receipt in the Northern Trust Brokerage Account

To help us track your transfer in a timely manner, please inform Sydney Campbell, WBUR Campaign and Development Associate, at (617) 358-2340 or sydneycc@wbur.org of:

- The company stock/ mutual fund you intend to transfer, OR the approximate value of your gift
- Your stock broker's name and telephone number, and the gift designation

WE STRONGLY URGE YOU TO REQUEST PROMPT TRANSACTION CONFIRMATION FROM YOUR BROKER
