

Instructions for Donation of Stock (Updated 11/16/2023)

1. The donor should call, write, or e-mail North Bennet Street School to inform us of their intent to make a gift of stock. All communications can be referred to either, Colleen Walsh Powell, Director of Development, or Annie Hayes, Director of Institutional Support at 617-227-0155.

E-mail contacts are cwpowell@nbss.edu and ahayes@nbss.edu respectively.

2. Instruct your broker of your intent to donate shares of stock/mutual funds to North Bennet Street School. To transfer electronically, your broker will require a letter of authorization from you that should contain the following delivery instructions:

DTC Number: 0062

Vanguard Brokerage Account Number: 58447002

Vanguard Brokerage Account Name: North Bennet Street School

Once your brokerage firm authorizes the transaction, an electronic transfer will take place. It may take several days from the date of your initial request for the transaction to be completely settled in the School's account at Vanguard.

3. You will receive a gift acknowledgement from NBSS. The value of your gift will be equal to the average trading value (high/low) of the stock on the date of the transaction.