

The Advent School

Stock Transfer Instructions

Prior to transfer, please contact Jeff Morgan, Director of Finance and Operations, at (617) 742-0520 x 16 so that the School may prepare to accept your gift.

Please be prepared to provide the following information:

- Broker's name
- Stock owner's name, if different from donor name
- Name of stock and number of shares
- Intended purpose of the gift

After contacting The Advent School, your broker should use the following DTC delivery instructions:

Stock Transfer Agent:

Pershing LLC

DTC: 0443

Account # 5XM397413

Advent School Capital Fund Account

Att: Eric J. Philippi

Telephone: (617) 217-6160

Fax: (617) 830-4930

Email: eric.phillippi@db.com

You will receive an official acknowledgment stating the mean value of your gift for tax reporting purposes.

Please contact Jeff Morgan, Director of Finance and Operations, (617) 742-0520 x 16 or jmorgan@adventschool.org if you have any questions about making your stock gift.

Thank you for supporting The Advent School!