



APPRECIATED SECURITIES
ELECTRONIC TRANSFER INSTRUCTIONS

1. Advise your broker that you wish to contribute a specific number of shares of stock to Saint Michael's College. You will most likely need to provide written instructions to your broker.

(Included below is a sample letter to instruct your broker for stock transfer.)

2. Inform Saint Michael's College of the purpose of your gift (i.e., Saint Michael's Fund, existing scholarship, etc.) and the impending stock transfer, either by phone or mail Saint Michael's a copy of the written instructions sent by your broker. Please include which stock you will be transferring to help us identify the gifts as they are received.
3. Direct your broker to transfer the shares to the College's account:

State Street Bank & Trust Company

DTC Routing #997

SMC Account #JZA2

4. Saint Michael's College is a 501(c)3 organization, our tax identification number is 03-0179403.
5. In accordance with IRS regulations, Saint Michael's College values a gift of securities based on the mean value of the securities on the date that the securities are **received** into the College's account.

If you or your broker need additional information or assistance, please call Linda Donahue at (802) 654-2563 or (888) 448-7111; or email ldonahue@smcvt.edu.

Thank you for your gift!

SAMPLE LETTER OF INSTRUCTION TO BROKER FOR STOCK TRANSFER

<<**Date**>>

<<**Name of Broker**>>

<<**Address**>>

RE: Letter of Instruction to transfer securities

Dear _____:

I wish to irrevocably contribute <<**insert number of shares or dollar amount**>> of <<**insert stock name**>> stock to Saint Michael's College.

Please transfer these shares from my Account Number: #_____ to Saint Michael's College in Colchester, Vermont (tax I.D. #03-0179403) on or before <<**insert date**>>.

Please transfer the shares to Saint Michael's College brokerage account with State Street Bank and Trust Company as follows:

State Street Bank & Trust Company

DTC Routing #997

Account #JZA2

If there are any questions about this transfer of stock, please call <<**insert your name and phone number**>>.

Thank you,

(Signature/Donor Name)

(Spouse Signature/Name)

(if applicable)

cc: Saint Michael's College
Institutional Advancement
One Winooski Park – Box 256
Colchester VT 05439