

Library Trustees Stock Donation Instructions

Stock Donation Procedure

The general procedure for such a transfer is for the current owner to submit a letter of instruction requesting delivery of shares to the Library Trustees account at Fidelity. Details needed would include

1. The name of the security: _____
2. The number of shares: _____
3. The name of the account holder at Fidelity: TTEES OF THE GOODNOW MEM BLDG
4. The Fidelity account number: Z69-566292
5. Fidelity's DTC number: 0226

This assumes that the shares held are in an account outside of Fidelity.

The patron will need to provide his/her brokerage company with Fidelity's address/contact information, as well as our Depository Trust Corporation (DTC) number, which is 0226. The contact information/address is as follows:

Fidelity Contact Information:

Fidelity Investments
Attn: TOA Receives
100 Crosby Parkway
Mail zone KC1A
Covington, KY 41015

“TOA Receives” stands for “Transfer of Assets Receives”. It is the department within Fidelity that receives assets delivered from other firms.

Fidelity Phone Number

Phone 866-755-6372, menu option 2. This number should only be used by representatives from the delivering firm--representatives at this number are not licensed to talk directly to investors.

Representatives are available at this number Monday through Friday 9:00 a.m. until 5:00 p.m. Eastern time.

Sample Stock Donation Letter

Date: [insert date]
To: [Brokerage Firm]
[Broker's Name]
[Broker's Address]
[Broker's Phone Number]

Dear [Sir or Madame]:

I would like to make a gift of stock on [insert date] to The Trustees of the Goodnow Memorial Building. Please transfer the following security(ies) from my account # [your account number] to Fidelity (Phone 866-755-6372, menu option 2) via DTC for the benefit of The Trustees of the Goodnow Memorial Building, account Z69-566292. The DTC number for Fidelity is 0226.

This is a charitable donation. The Trustees of the Goodnow Memorial Building Tax ID number is 04-3300948.

Securities to be transferred:

[number] shares of [company] stock, symbol [stock symbol].

The Trustees will also provide me with a receipt for this gift.

Thank you for your prompt attention to this matter.

Sincerely,

[Your Name]

cc: Trustees of the Goodnow Memorial Building
Attn: Treasurer
2 Town Hall Drive
Princeton, MA 01541
Library: 978-464-2115
Fax: 978-464-2116