



Office of Advancement

Gifts of Stock in Support of a Life Income Gift

If you are funding a Charitable Gift Annuity or Charitable Remainder Unitrust with appreciated assets, please contact the Office of Planned Giving for the full account details to complete the following Delivery Instructions for your gift.

1. DTC Eligible Securities

DTC participant #0987
Charitable Asset Management
One Iron Street, 6th Floor
Boston, MA 02110
FFC:BJ50
For a/c# TBD
Account Name: TBD

2. Physical Form Securities

By U.S. Postal Service or Federal Express

Attn: Tim Morrison
State Street Global Advisors
Charitable Asset Management
One Iron Street, 6th Floor
Boston, MA 02110
(Stock/Bond powers should be sent under separate cover)

3. Federal Reserve Securities

By Federal Reserve Wire to:
STATE ST BOS/SPEC/BJ50/(a/c#52-)
Account name:
ABA Routing #: 011000028 (Free Delivery)



HOBART AND WILLIAM SMITH COLLEGES

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PREPARING STUDENTS TO LEAD LIVES OF CONSEQUENCE