



# CHOATE ROSEMARY HALL

## Securities Transfer Instructions

Broker:

Marguerite Tomeo  
Oppenheimer & Co., Inc.  
1781 Highland Avenue, Suite 104  
Cheshire, CT 06410  
(203) 272-9400 (T)  
DTC#: 571

Choate Rosemary Hall Foundation, Inc.  
Account: A30 5041210  
Tax Exempt #: 06-0910420

To assure proper crediting of the gift, please contact Martha Glowacki in the Choate Rosemary Hall Development Office directly via mail, telephone, or fax with the following information:

- Name of the donor
- Name of the stock to be transferred
- Number of shares and/or approximate gift value
- Gift designation (Annual Fund, Capital Gift)

Martha Glowacki  
Choate Rosemary Hall  
P.O. Box 5043  
333 Christian Street  
Wallingford, CT 06492  
(203) 697-2185 (T)  
(203) 697-2683 (F)  
[mglowacki@choate.edu](mailto:mglowacki@choate.edu)

Gift date and valuation are determined per IRS regulations.

The official gift date is the date the shares arrive in the Choate Rosemary Hall account. The value of the stock is the average of the high and low per share (mean market value) on the date of gift.