

WESTTOWN SCHOOL

975 Westtown Road, West Chester, Pennsylvania 19382-5700 610-399-0123

MEMORANDUM

FROM: Becky Bernstein, Westtown School

SUBJECT: Stock transfer procedures

Please be advised that a stock transfer for Westtown School should be handled as follows:

- 1) At least 24 hours before you expect the transfer to occur, have your broker contact Becky Bernstein at becky.bernstein@westtown.edu or at 610-399-7839 to advise her that a gift is coming. Please specify:
 - a. purpose of the gift (annual giving, reunion fund, etc.)
 - b. number of shares
 - c. company name
 - d. stock symbol
 - e. brokerage institution that is sending it

- 2) Have your broker transfer the gift to:

Bryn Mawr Trust Company
DTC # 0141
FBO (for the benefit of) Westtown School
Account # 6849-4414

Please let me know if you have any additional questions or if I may be of any further assistance. **As transferred stock does not come into our account with donor information, it is important that either you or your broker let Westtown know when you are actually transferring the stock so that we can indicate it in our records.** This helps to ensure that, if any questions arise regarding a stock transfer, our office has information regarding what transfers were expected.

Thanks so much for your support!

Becky Bernstein
Advancement Services Manager
610-399-7839
becky.bernstein@westtown.edu

