



**GIFTS OF APPRECIATED SECURITIES
TO
NEW ENGLAND HISTORIC GENEALOGICAL SOCIETY**

Thank you for considering a gift to NEHGS. Stock or other publically traded securities may be transferred electronically or by mail, as explained below. In either case, donors will be notified of the stock receipt by the Society. The donor's tax deduction will be based on the mean market value of the stock on the day of the shares transfer into the NEHGS account.

- ***Please alert the NEHGS Development Office before transferring stock***, and send the Society either a copy of the broker's instructions or a letter of intent including the number of shares and gift date transfer. Please note that due to confidentiality protocols, the NEHGS Development Office often has no way of knowing who sent the stock if we are not notified by either you or your broker. Prior to the stock transfer, please contact Ted MacMahon, Director of Development at NEHGS, at 617-226-1218 or tmacmahon@nehgs.org.

ELECTRONIC TRANSFER OF STOCK

Stock may be sent electronically by your broker or trust advisor to Morgan Stanley Smith Barney, the Society's broker. You may instruct your broker to "deliver free" with the following information:

- Morgan Stanley Smith Barney's number is DTC 418.
- The Society's account number is 382-11426-13 026.
- The Society's federal tax number (EIN#) is 04-2104757.

The Society's contact at Morgan Stanley Smith Barney is Tom Bernazani (617-570-9257).

TRANSFER BY MAIL

If you wish to send the actual certificate(s) by mail, please do the following:

- Write part of the NEHGS account number (382-11426) in the upper right-hand corner of the certificate(s). Mail the UNSIGNED certificate(s) by Certified Mail to:
Morgan Stanley Smith Barney
Attn: Tom Bernazani
28 State Street, 27th Floor
Boston, MA 02109
- Include a letter notifying Mr. Bernazani that the donation of xx shares of (stock name) is a gift to the New England Historic Genealogical Society, and send a duplicate copy to the NEHGS Development Department. Remember, the stock sale and gift processing will be expedited more quickly when you include this letter of intent.
- Sign and date a Morgan Stanley Smith Barney (available through NEHGS) stock power form for each stock company; the rest of the form may be left blank. Mail the stock power form(s) under separate cover to Morgan Stanley Smith Barney at the above address.

An alternate method of transfer is to have the issuing corporation transfer the stock to the Society's name (they will change it on the certificate) and send it by certified mail to the NEHGS Development Department. Please notify NEHGS in advance of this transfer.