

STOCK TRANSFER INSTRUCTIONS AND FORM

1. Please complete form below.
2. Please submit the form, or other forms as required by your financial institution, to your advisor to initiate the transfer.
3. Kindly email a copy of the completed form (you may block out/remove your account #) to gifts@peddie.org at The Peddie School, so we can properly track your gift.

The Peddie School's preferred method of transfer of stocks held in "street name" is via electronic transfer. If the stocks are DTC (Depository Trust Company) eligible, they may be transferred electronically to:

The Peddie School account at Merrill Lynch, which is **DTC # 8862**.

The appropriate account is **The Peddie School # 876-04A54**.

Our agent at Merrill Lynch is: **David Shea, david_c_shea@ml.com, (609) 243-7932**.

Please be sure your advisor includes your name and account # with your transfer.

The value of a charitable gift of readily marketable stock is based on the mean between the high and low share price on the day the stocks are received into an account at The Peddie School. Please note: A donor's instructions to a broker to transfer stock are not sufficient to complete the gift. The date of gift is the date that the DTC actually transfers your stock into The Peddie School's account.

While it is possible to have stocks reissued in a charity's name, we do not recommend this method of transfer for charitable gifts. The time delay in the reissue process may cause a variance in the value of the stocks, and the official date of the gift would be the date the stocks are reissued in The Peddie School's name, rather than the date the donor authorized the transfer. This might cause the official gift date to fall in a tax year or fiscal year different from the one intended by the donor.

The Peddie School's Tax Identification Number: 21-0634492

If you have questions or would like further information, please contact:

Lauren Sorrento, Senior Manager of Data Operations, Alumni & Development Office
or Lynn Klionsky, Development Operations Coordinator

Phone: (609) 944-7608 | lsorrento@peddie.org | lklionsky@peddie.org | fax: (609) 944-7902
Alumni & Development Office, The Peddie School, 201 S Main St, Hightstown, New Jersey 08520

Please use the form below to fax or mail the necessary information to your financial institution.

STOCK TRANSFER FORM

To: _____

Date: _____

Please transfer the following securities:

_____ shares of _____

From: Name on the account: _____ Account # _____

To: Merrill Lynch
DTC #8862
n/o The Peddie School
Account #876-04A54

Sincerely,

(Print Name)

(Signature)