



The Bement School

Alumni and Development Office
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Phone: 413-774-3021
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PROCEDURES FOR GIFTS OF SECURITIES

1. Please notify Sara Ardrey, Director of Alumni and Development, at (413) 774-3021 or sardrey@bement.org before the transaction occurs, or if you have any questions.
2. Please notify your broker or bank in writing to transfer the securities. Shares should be sent via DTC to:

Gage Wiley & Co./WFCS
DTC # 0141
Bement School Account #1477-9477

Notes may be added to the transfer to designate donor name and fund (please limit notes to five words or less). For example:

Annual Fund Donor John Smith
Or
Pine Hill Fund Donor John Smith
Or
Jackson Fd Donor John Smith
Or
Boarding Prog Donor John Smith

For any broker or bank questions regarding securities transfers, please contact Ted Pennock at (800) 332-9558 at Gage Wiley & Co.

Thank you for your generosity to Bement.