



**SOUTH KENT**  
SCHOOL

### ***Instructions for Making Gifts of Securities***

#### **If your securities are held by a broker or bank:**

Notify your broker or bank in writing to transfer the securities as follows:

Wells Fargo Advisors, LLC  
555 Long Wharf Drive 9<sup>th</sup>  
New Haven, CT 06511  
Attn: Mr. Kevin Peel, CRPC® Financial Advisor  
(800) 332-2774, Direct Line: (203) 784-4133, Fax: (203) 784-4146

**For South Kent School Account # 5860-9481 -- DTC#: 141**

*Please notify Jennifer Haase, Director of Alumni Relations, at South Kent School before the transaction occurs via phone: (860) 927-3539, ext. 206 or email: [haasej@southkentschool.org](mailto:haasej@southkentschool.org)*

#### **If you hold the securities:**

Send or deliver the unendorsed certificates by First Class mail with a letter of transmittal giving name and address to:

South Kent School  
Attn: Development Office  
40 Bull's Bridge Road  
South Kent, CT 06785

In a separate envelope, mail to the same address a stock power signed exactly as certificate is registered, in blank (do not fill in any other information) and a copy of your transmittal. Do not re-register the shares into the name of South Kent School. If you need a stock power, call your broker or our Advancement Office.

South Kent's Federal Tax Identification Number: 06-0646906

For your assistance, here is a sample letter for you to use for your broker and a copy to the School

X'YZ Brokerage Services Address RF-: (Your Account #) (Your Name[s])

It is my wish to contribute \_\_\_\_\_ shares of \_\_\_\_\_ company common stock currently in my referenced account to South Kent School. Please send the \_\_\_\_\_ shares of \_\_\_\_\_ Company via DTC to:

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555 Long Wharf Drive 9<sup>th</sup>  
New Haven, CT 06511  
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