



## Securities Transfer Instructions

Giving Securities to Stonington Free Library

PO Box 232

Stonington, CT 06378

Contact: Development Coordinator

860-535-0658 / [development@stoningtonfreelibrary.org](mailto:development@stoningtonfreelibrary.org)

To ensure accurate designation and proper acknowledgement of your gift, please let the Stonington Free Library know about your plans for a stock gift by contacting the Development Coordinator (contact information listed above). We anticipate that once the shares of stock have been transferred, the gift will be acknowledged in writing by the Library within 14 days. The acknowledgement letter will set forth the value of the shares as of the date they entered the Library's account.

### If your broker or bank holds the certificate

To transfer stock using the DTC automated system, your financial agent needs the following information:

- **Account Name:** Stonington Free Library Association
- **Account Number:** 4340 8621
- **Charles Schwab & Company**
- **DTC #:** 0164 **Code:** 40
- The date for establishing the gift value of the stock is the day the shares enter the Stonington Free Library Account.

To confirm the transaction, please have your broker or bank contact Bryan Rodgers at Charles Schwab, Mystic Independent Branch:

**t:**860-415-8090 / **f:**860-536-0349 / **email:** [Bryan.Rodgers@schwab.com](mailto:Bryan.Rodgers@schwab.com)