



## Stock Transfer Authorization

A gift of stock or securities is a wonderful way to support the International Institute of New England (IINE). Everything you need to donate stock or securities is right here and can be completed in as little as two easy steps.

If you have questions or would like our assistance in the process, please feel free to contact Peter Kim on our Donor Services Team at (617) 801-5257 or email [pkim@iine.org](mailto:pkim@iine.org).

### Gift Valuation

Your generous gift to the International Institute of New England will be valued at the close price on the date of the gift.

In keeping with IRS regulation, IINE can only accept donations of commonly held, publicly traded stocks.

### Gifts by Electronic Transfer

The easiest way for you to gift stock or securities to IINE is through an electronic transfer (DTC) from your brokerage account to IINE's account. Please remind your broker(age) to include all of the information including your name, contact information and special instructions for the transfer. This information is essential for timely acknowledgement.

When stocks are transferred electronically, we are informed only of the stock name and the number of shares, not the name of the donor, unless you authorize your broker to share this information with us. *We need to understand the intent of your gift in order to provide an acknowledgment letter for tax reporting purposes.*

## Two Easy Steps:

1. Complete the online [Stock Gift Notification form](#).
2. Complete this Electronic Transfer Authorization Form and provide it to your broker. This will provide your broker with all the information they need to complete a transfer on your behalf.

## Certificate Transfer

If you hold stocks or securities in certificate form, please mail your unendorsed paper certificates to our Broker, noted below with a Stock Power Form. A signed stock certificate is legal tender.

## Four Easy Steps:

1. Complete the online [Stock Gift Notification](#) form.
2. Complete a Blank Stock Power Form for each certificate.
3. Take the Blank Stock Power Form(s) to your bank to have your signature notarized.
  - Please do not sign the Stock Power Form(s) until you are in front of the bank staff who will guarantee your signature.
  - You will need one form of picture identification.
  - Signatures need to be signed as they appear on the certificate. Apart from your signature, please do not complete any additional information on the form.
4. For security purposes, send the documents in two separate envelopes to IINE's Broker as noted below: (via USPS Registered Mail with Return Receipt Requested)
  - Send the signature guaranteed Stock Power Form(s) in one envelope
  - Send the UNSIGNED stock certificate(s) in a second envelope to IINE's broker at:

Fidelity Investments, PO Box 770001, Cincinnati, OH 45277-0002

Phone: 800-343-3548

IINE account number: Z47930613

IINE's EIN: 04-2104325

## Contact

International Institute of New England  
Attn: Donor Services  
2 Boylston Street, 3rd Floor  
Boston, MA 02116

Broker for International Institute of New England

Fidelity  
Fidelity Investments  
PO Box 770001, Cincinnati, OH 45277-0002  
Phone: 800-343-3548

Thank you for your generous gift to International Institute of England. The International Institute of New England is qualified as a charitable organization under Section 501(c)(3) of the Internal Revenue Code. Contributions to IINE are tax-deductible to the extent permitted by law.

The material presented here is not offered as legal or tax advice. Please seek the counsel of your tax advisor, attorney and/or financial planner to review tax calculations to ensure that a contemplated gift is appropriate for your situation.

## Electronic Transfer Authorization Form

Please transfer the listed securities from my account to International Institute of New England's account with Fidelity using the following information:

### Fidelity

IINE's account number: Z47930613

IINE's EIN: 04-2104325

### Brokerage Information

Broker's Name \_\_\_\_\_

Brokerage \_\_\_\_\_

### Personal Information

Account #

Title

Name

Address

City

Zip Code

Country

☐ I hereby release my name and contact information so that I may receive a receipt from International Institute of New England.

If you choose not to release your name and contact information, IINE may not be able to provide you with a receipt of your gift.

## Securities Information

Name of Security \_\_\_\_\_

Number of Shares/ Bond Face Value \_\_\_\_\_

Signed (Donor) \_\_\_\_\_ Date \_\_\_\_\_

Signed (Donor, joint-owner) \_\_\_\_\_ Date \_\_\_\_\_

### Irrevocable Stock or Bond Power

For value received, the undersigned does (do) hereby sell, assign, and transfer to:

Social Security or Taxpayer ID number:

#### If stocks, complete this portion

\_\_\_\_\_ Shares common stock of \_\_\_\_\_

Represented by certificate(s) No.(s) \_\_\_\_\_

standing in the name of the undersigned on the books of said Company.

#### If bonds, complete this portion

\_\_\_\_\_ Bonds of \_\_\_\_\_

in the principal amount of \$ \_\_\_\_\_, No.(s) \_\_\_\_\_

inclusive, standing in the name of the undersigned on the books of said Company.

The undersigned does (do) hereby irrevocably constitute and appoint

\_\_\_\_\_

attorney to transfer the said stock or bond(s), as the case may be, on the books of said Company, with the full power of substitution in the premises.

#### IMPORTANT:

The signature(s) to this power must correspond with the name(s) as written upon the face of the certificate(s) in every particular without alteration.

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\_\_\_\_\_

[person(s) executing this power sign(s) here]

[Date]

Please note:

- Apart from your signature, please do not complete any information on the stock power form.
- Your signature on the stock power form must be medallion guaranteed.
- It is very important that your certificate & your stock power form be sent in separate envelopes.