



International  
Institute of  
New England

## 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 our Donor Services Team at [giving@iine.org](mailto:giving@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.*

**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.

\_\_\_\_\_

\_\_\_\_\_

[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.