



## Asset Transfer Instructions for Outright Gifts

Northfield Mount Hermon School is grateful for your support. The instructions for transferring cash and other assets to the school appear below. If, at any time, you have questions about making your gift or you would like assistance in transferring cash or other assets to the school, here's where you can find help:

**NMH Taxpayer Identification No.** Taxpayer Identification No. 04-2109865

### Ways to Give

**ACH Transfers** Bank of America  
Springfield, MA  
ACH No. 011000138  
Account No. 9428407451  
Please designate the ACH transfer as a gift to NMH School.

**Wire Transfers** Bank of America  
Springfield, MA  
ABA No. 026009593  
Account No. 9428407451  
Please designate the wire transfer as a gift to NMH School.

**Credit Card** The NMH secure, online server: <http://www.nmhschool.org/support/>  
(Visa, MasterCard or American Express) Telephone: 1-866-664-4483

Please note that the development staff generally answers the telephone from 8:00 a.m. to 4:30 p.m. (Eastern Time Zone).

**Publicly-traded Stocks and Bonds** Please contact: Paula Carr '77, Investment and Finance Administrator  
(413) 498-3209  
[paula\\_carr@nmhschool.org](mailto:paula_carr@nmhschool.org)

**Other gifts** Please contact: Marvin L. Kelley '60  
(such as non-publicly traded Senior Gift Planning Advisor  
securities, real estate, artwork, (413) 498-3691  
royalties, and intellectual [mkelley@nmhschool.org](mailto:mkelley@nmhschool.org)  
property; planned gift  
arrangements; and international  
gifts)



## Asset Transfer Instructions for Publicly-traded Stocks and Bonds

### Step 1. Notify NMH

Before the transfer takes place, please take a moment to notify Paula Carr in the NMH Office of Finance and Administration:

Tel. (413) 498-3209	NMH School
fax (413) 498-3365	One Lamplighter Way
paula_carr@nmhschool.org	Mount Hermon, MA 01354

NMH cannot sell the securities unless we know the identification of the donor.

### Step 2. Provide this NMH information to your broker (DTC Transfers)

Your broker will need the following information about NMH's account at J.P. Morgan Chase Bank, N.A. (Book Entry Transfers)  
4 New York Plaza – 15<sup>th</sup> FLR  
Mail Code: NY1-E182  
New York, NY 10004-2413  
Attn: Mary Leonard  
Tel.: (212) 623-8739  
Email: mary.leonard@jpmorgan.com

Northfield Mount Hermon School Taxpayer Identification No. 04-2109865

DTC Participant Account Number:	0902
Reference:	Account P24344
Further Reference:	Northfield Mount Hermon School
Attention:	Mary Leonard

### Instructions for Transfer of Physical Stock Certificates or Mutual Fund Shares

To obtain information on transferring a physical stock certificate or mutual fund shares to NMH, please contact Paula Carr.

Sample Letter  
(May be used to direct your broker on the transfer of securities)

Date: \_\_\_\_\_  
Broker's Name: \_\_\_\_\_  
Brokerage Firm Name: \_\_\_\_\_  
Street Address; City, State, Zip: \_\_\_\_\_  
Re: Brokerage Account Number: \_\_\_\_\_  
Name on the Account: \_\_\_\_\_

Dear \_\_\_\_\_:

Please transfer \_\_\_\_\_ shares of \_\_\_\_\_ stock in my  
(number of shares) (name of stock)

above-referenced account as a gift to Northfield Mount Hermon School via DTC to:

J.P. Morgan Chase Bank, N.A. (Book Entry Transfers)  
4 New York Plaza – 15<sup>th</sup> FLR  
Mail Code: NY1-E182  
New York, NY 10004-2413  
Tel.: (212) 623-8739  
Email: mary.leonard@jpmorgan.com

DTC Number: 0902

NMH Account Number: P24344

Further Reference: Northfield Mount Hermon School and \_\_\_\_\_  
(Donor's Name)

Thank you for your assistance.

Sincerely,

\_\_\_\_\_  
(Donor's name as it appears on the account)

**Purpose of Gift**  NMH Annual Fund. My/our highest giving priority:

- |  |   |
|--|---|
| <input type="checkbox"/> School's highest priorities | <input type="checkbox"/> Visual and performing arts |
| <input type="checkbox"/> Financial aid               | <input type="checkbox"/> Athletics                  |
| <input type="checkbox"/> Academic programs           | <input type="checkbox"/> Library resources          |
| <input type="checkbox"/> Faculty support             | <input type="checkbox"/> Campus facilities          |

Specific Capital Gift: \_\_\_\_\_

**So your gift can be acknowledged, please send a copy of this letter to Paula Carr, NMH School, One Lamplighter Way, Mount Hermon, MA 01354; Fax: (413) 498-3365. To contact Paula by phone: (413) 498-3209.**