



NORTHFIELD
MOUNT HERMON

NMH Asset Transfer Instructions

Northfield Mount Hermon is grateful for your support. The instructions for transferring cash and other assets to the school appear below.

NMH Taxpayer Identification No. 04-2109865

ACH Transfers TD Bank, 324 Main Street, Greenfield, MA 01301
ABA No. 211370545
Account No. 8251653892
Please designate the ACH transfer as a gift to NMH

Wire Transfers TD Bank, 324 Main Street, Greenfield, MA 01301
ABA No. 031101266
Account No. 8251653892
For international, add Swift code: NRTHUS33XXX
Please designate the wire transfer as a gift to NMH

Credit Card The NMH secure, online server:
(Visa, MasterCard, Discover, <https://community.nmhschool.org/NMHFund>
or American Express.) Tel. (866) 664-4483

Please note that the advancement staff generally answers the telephone from 8:00 AM to 4:30 PM (Eastern Standard Time).

Publicly Traded Stocks, Bonds, and Mutual Funds Please review the “Asset Transfer Instructions for Publicly Traded Stocks, Bonds, and Mutual Funds” and “Sample Letter” on the following pages.
Contact: Donna Card
Gift Record Specialist
(413) 498-3297
dcard@nmhschool.org

Other gifts Contact: Jennifer D. Williams '87
(such as non-publicly traded Director of Major and Planned Gifts
securities, real estate, artwork, (413) 498-3102
royalties, intellectual property, jwilliams@nmhschool.org
planned gift arrangements, and
international gifts)

Asset Transfer Instructions for Publicly and Global Traded Stocks, Bonds, and Mutual Funds

Step 1. Notify NMH Before the transfer takes place, please notify Donna Card in the NMH Office of Advancement:

Tel. (413) 498-3297	NMH
Fax (413) 498-3164	One Lamplighter Way
dcard@nmhschool.org	Mount Hermon, MA 01354

Step 2. Provide this NMH information to your broker Your broker will need the following information about NMH's account at U.S. Bank (Book Entry Transfers)

(DTC Transfers)

Contact person for Domestic Publicly Traded Stock

Niki Patel, Account Associate
U.S. Bank - Institutional Trust & Custody
50 S. 16th Street
Philadelphia, PA 19102
Tel. (215) 523-6107 Fax (844) 695-1530
niki.patel@usbank.com

Contact person for Global Traded Stock:

Anna Bins, Global Client Services
U.S. Bank- West Side Flats
60 Livingston Avenue
St. Paul, MN 55107
Tel. (651) 466-5928
Anna.Bins@usbank.com

Northfield Mount Hermon Taxpayer Identification No. 04-2109865

U. S. Bank DTC Number:	2803
Client Account Name:	Northfield Mt Hermon Sch Sec Gift
Client Account Number:	001050995330

Step 3. For Mutual Fund Transfers Only Please complete the *Mutual Fund Gift Form* below and email it to dcard@nmhschool.org. Your broker or financial advisor can provide the necessary information.

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 Code: _____
Brokerage Account No.: _____
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 via DTC to:

U.S. Bank NA
Attn: Niki Patel, Account Associate
Institutional Trust & Custody
50 S. 16th Street
Philadelphia, PA 19102
Tel. (215) 523-6107 Fax (844) 695-1530
niki.patel@usbank.com
U.S. Bank DTC Number: 2803
Client Account Name: Northfield Mt Hermon Sch Sec Gift
Client Account Number: 001050995330
Further Reference: _____
(Donor's Name)

Thank you for your assistance.

Sincerely,

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

Purpose of Gift NMH Fund

Capital Gift: _____

Send a copy of this letter to Donna Card, Northfield Mount Hermon, One Lamplighter Way, Mount Hermon, MA 01354; Fax (413) 498-3164. To contact Donna by phone, call (413) 498-3297.

Mutual Fund Gift Form

Date: _____

Fund Cusip Code: _____
(Provided by your broker or financial advisor)

Mutual Fund Name: _____

Shares Expected: _____

Your broker's contact information:

Name: _____

Email: _____

Phone: _____

Fax: _____

Please provide one form for each Mutual Fund Gift

For US Bank Use Only

SEI Account number: **001050995330**

Reinvest method: Cash/Cash