



**Letter of Direction for a Gift of Publicly Traded Securities to Trinity College School Fund Inc.**

To: \_\_\_\_\_  
(Name of Your Brokerage/Delivering Custodian)

**Instructions to Broker/Delivering Custodian**

I hereby give authority to deliver free the following securities as follows to:

**Broker:** National Financial Services LLC

**DTC Participant Number:** 0226

**Account Name and Number at Brokerage:** Trinity College School Fund Inc., HDQ-743992

**Contact at Broker:** John Britten 781-934-6044

Security \_\_\_\_\_ CUSIP# \_\_\_\_\_

Market Symbol \_\_\_\_\_ Number of Shares/Units to Transfer \_\_\_\_\_

**Donor/Client Information**

**GIFT DESIGNATION:** \_\_\_\_\_

Name for receipting purposes: \_\_\_\_\_

Full Address: \_\_\_\_\_

**Broker/Delivering Custodian Information**

Broker: \_\_\_\_\_

DTC: \_\_\_\_\_

Account name and number: \_\_\_\_\_

Contact name and number: \_\_\_\_\_

**Authorization of Donor/Client**

\_\_\_\_\_ / \_\_\_\_ / \_\_\_\_  
signature month / day / year

Send the completed form(s) to your broker and a fax copy to Trinity College School Fund Inc. at **978-921-9039** attention Derek A. Smith. Unexpected or unidentifiable transfers will impede the receipting process.

The value of the charitable gift receipt is based on the average of the high and low prices of the shares the day they are received by the Trinity College School Fund Inc.'s custodian. Please contact the Trinity College School Fund Inc. office at 508-523-1221 if you have any questions.