Thank you for your interest in donating securities to the University of Massachusetts. There are several ways to transfer securities including electronic transfer, mailing of stock certificates or hand delivery of stock certificates.

**ELECTRONIC TRANSFER OF STOCK SHARES**

The most popular and efficient way to donate stock to the university is via electronic transfer.

If your stock is handled by a broker, notify the broker that you wish to make a donation of securities to the University of Massachusetts Amherst. Your broker will need a written authorization from you before they can make the transfer. Be sure to tell them the name of the stock you would like to transfer, the number of shares, and where you would like to designate your gift once it reaches the university.

Once you have authorized the transfer, ask your broker to contact Wendy Curtice in the Information & Donor Services Office at (413) 577-1480. Our office will give your broker complete transfer instructions.

**NOTE:** Even if you have donated securities in the past, be sure your broker contacts us BEFORE initiating the transfer. The transfer instructions can change from year to year. A quick phone call from your broker to verify current instructions will prevent any transfer problems.

**MAILING OR HAND DELIVERING STOCK CERTIFICATES**

Stock certificates should be mailed or delivered to:

Information & Donor Services  
Memorial Hall  
University of Massachusetts  
134 Hicks Way  
Amherst, MA 01003-9270  
Attn: David Markland

If mailing a stock certificate, send your UNENDORSED certificate(s) and a cover letter, which includes your name, address, and purpose of the donation, in one envelope. In a second envelope, send a signed, signature guaranteed stock power. (Note: there are some situations which require this signature guarantee or indemnification and some that do not. Please inquire as to whether it is needed for each situation, including those that deal with power of attorney.) We strongly recommend using registered mail to forward your certificates and stock power. A stock power form can be obtained at your local bank or by calling Wendy Curtice in the Information & Donor Services Office at (413) 577-1480.

If hand delivering a stock certificate, please deliver them to the address listed above.

**NOTE:** Please do not mail endorsed certificates. Once the certificate is endorsed, it is legal tender and can be exchanged by anyone.
DONATIONS OF SECURITIES

ELECTRONIC STOCK TRANSFER INFORMATION FOR BROKERS

BANK

Mellon Bank, Boston, MA  DTC#: 0954

BANK CONTACTS

Elaine Mestas  Telephone:  (617) 722-7223  Fax:  (617) 722-7362

Anthony Cerbone  Telephone:  (617) 722-7546  Fax:  (617) 722-7362

ACCOUNT NUMBERS

For donations designated to UMass Foundation scholarships/endowments use the following:

Account # MAFF1684002

OR

For donations designated to a UMass Amherst Campus account use the following:

Account # MAFF1904002

NOTE: There is no space between the letters and numbers within the account #.

Please contact Wendy Curtice in the Information & Donor Services Office with information regarding your client’s securities donation before the transfer is initiated. This will help the transfer go through smoothly. Wendy can be reached at (413) 577-1480 or by email at wcurtice@admin.umass.edu