



## STOCK TRANSFER/AUTHORIZATION FORM

This form may be used to authorize and direct your advisor to transfer directly to Wellesley Education Foundation (WEF), through electronic transfer, shares held by the brokerage firm in a street name, book entry, or electronic account.

In the "To:" block, fill in the mailing address of your brokerage, including the name of your broker, if known.

Insert your account number in the text of the letter where indicated; then list the securities you intend for your brokerage to transfer for WEF's control in the space provided. Each owner of the assets in the account to be transferred must sign the form.

Finally, either mail or fax an original copy of the form to your broker (if your brokerage accepts authorizations via facsimile transmission) and send a brief note to:

WEF Treasurer:  
[weftreasurer@gmail.com](mailto:weftreasurer@gmail.com)

AND

Wellesley Investment Partners, Mary Beth Mahoney:  
[marybeth@wellesleyinvestmentpartners.com](mailto:marybeth@wellesleyinvestmentpartners.com)

Thank you very much for your generosity,  
**Wellesley Education Foundation**  
[www.wellesleyeducationfoundation.org](http://www.wellesleyeducationfoundation.org)



## STOCK TRANSFER/AUTHORIZATION FORM

To Whom It May Concern:

Please accept this letter as your authorization to transfer the following securities, as listed below, from my/our account number \_\_\_\_\_, which is currently are held by your firm, to the irrevocable control of Wellesley Education Foundation (WEF). You may complete this transfer by transferring the assets, as directed below:

Please use the following transfer instructions:

**Brokerage Firm:** TD Ameritrade

**DTC Clearing Number:** 0188

**Account Name:** Wellesley Education Foundation

**Account Address:** P.O. Box 812321 Wellesley, MA 02482

**Account Number:** 934011066

**Description of securities to be transferred:**

**Security Name / Symbol / No. of Shares / Approx. Market Value**

**NOTE: Please make sure to reference my name in the transfer process.**

Thank you in advance for your cooperation.

Sincerely,

\_\_\_\_\_  
Signature of Owner

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Joint Owner

\_\_\_\_\_  
Date

\_\_\_\_\_  
Print Name of Owner

\_\_\_\_\_  
Print Name of Joint Owner

Address of record:  
  
\_\_\_\_\_  
  
\_\_\_\_\_