



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 (Visa, MasterCard, Discover, or American Express.)
The NMH secure, online server:
<https://together.nmhschool.org/register/supportNMH>
Tel. (866) 664-4483
Please note that the advancement staff generally answers the telephone from 8:00 AM to 4:00 PM (Eastern Standard Time).

Publicly Traded Stocks, Bonds, and Mutual Funds Please review the “Asset Transfer Instructions for Publicly Traded and Global Stocks, Bonds, and Mutual Funds” and “Sample Letter” on the following pages.
Contact: NMH Advancement Services
Gift Records
(413) 498-3297
NMHGiftProcessing@nmhschool.org

Other gifts (such as non-publicly traded securities, real estate, artwork, royalties, intellectual property, planned gift arrangements, and international gifts)
Contact: Kathryn Gonnerman
Senior Director of Development
(413) 498-3090
kgonnerman@nmhschool.org

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

Step 1. Notify NMH Before the transfer takes place, please notify NMH Advancement Services:

NMHGiftProcessing@nmhschool.org

Tel. (413) 498-3297

Fax (413) 498-3164

NMH, One Lamplighter Way, 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)

Northfield Mount Hermon Taxpayer Identification No. 04-2109865

For Domestic Publicly Traded Stock:
(DTC Transfers)

Contact person: 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

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

For Global Stock:

The request *must* be initiated via fax on the contra firm letterhead.
Fax (866) 870-7146 with the following information:

- Client Fidelity Account Name: Fidelity Investments, FSIXX
- Client Account Number: Z40362160
- Delivering account registration and name on account
- Security description and ISIN/CUSIP
- Share amount
- Settlement instructions (exchange it trades on)
- Trade and Settlement dates (transfer dates)
- Contact info (name or group we can reach out to with email or phone number)

Contact for follow-up: foreigninfo@fmr.com

Step 3. For Mutual Fund Transfers Only

Please complete the *Mutual Fund Gift Form* below and email it to NMHGiftProcessing@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 publicly traded 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 Advancement Services, Northfield Mount Hermon, One Lamplighter Way, Mount Hermon, MA 01354; Fax (413) 498-3164. To contact an NMH representative 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