

## **Stock Transfers to Hamilton College**

As with all gifts, you should consult your own tax advisors to confirm that it is advantageous for you to contribute appreciated securities.

**If your broker (or bank) holds your shares**, you may request that they be transferred directly to Hamilton via DTC (Depository Trust Company):

Provide your broker with Hamilton's DTC information below and ask them to include your name in the wiring instructions:

Merrill Lynch Account  
DTC: 8862  
Account Number: #814-04355  
Account Name: The Trustees of Hamilton College  
Broker: Claudine Zigmund (860-728-3984)

In order for Hamilton to promptly process and credit the gift to you, let Todd Clark know the name of the stock, and the number of shares or approximate dollar amount you will be transferring (315-859-4209 or [tclark@hamilton.edu](mailto:tclark@hamilton.edu)).

The effective date of your gift will be the date the security is transferred into Hamilton's account, and the value of your gift will be the average of the high and low quotations for that day.

### **If you hold your shares in certificate form:**

Send the unendorsed certificate(s) by first-class mail to:

Todd Clark  
Communications and Development  
Hamilton College  
198 College Hill Road  
Clinton, NY 13323

By separate first-class mail, send Todd Clark a stock power form signed exactly as your name appears on the security but left otherwise completely blank. Include a letter of instruction designating your gift to Hamilton.

The valuation date will be the postmark date on the certificate and the stock power form (whichever is postmarked last), and the value of your gift will be the average of the high and low quotations for that day.

If your gift is to be less than the total number of shares listed on the certificate, include your social security number so a new certificate for the remaining shares can be issued.