

Wellington

Gift Security Procedures

Securities Held in a Brokerage Account

Securities held by a broker should be delivered by wire to our brokerage account. Please use The Wellington School account with Key Bank by contacting:

Joyce E Salizzoni, CFP®, CWS®
Email: Joyce_E_Salizzoni@keybank.com
Phone: (614) 365-3363

The Wellington School Tax ID: 31-0977200
DTC #: 2205
Account #: 2175606

Note: It is essential your broker or financial institution includes your name (that is, the name of the person transferring the securities) with the transfer instructions.

When transferring securities to The Wellington School, please let us know as soon as possible, as well as your intentions for how the money should be used. By doing so our broker can be alerted to accept the securities and we can acknowledge your gift properly. Please contact Mr. Jacob Ely, Assistant Director of Development for The Wellington Fund; (614) 884-4509; ely@wellington.org or Mrs. Kelly Heineike, Controller; (614) 324-8896; heineike@wellington.org

Note: The amount of your gift will equal the average of the high and low price of the security on the day it was transferred.

Securities Registered in Your Name

The Wellington School will need a signed stock power and letter of authorization. Please sign your name(s) exactly as it/they appear on the face of the certificate, and complete a separate stock power for each certificate. Please only complete the blanks where indicated. You may execute these documents yourself and deliver them with the stock certificate(s) to The Wellington School at our offices by hand, by mail or arrange to have a staff member meet you to pick them up.

If sending a stock gift by mail, we strongly encourage you to send the certificate(s) under separate cover from the stock power and letter of authorization. In all cases we recommend you not sign the back of the certificate(s) for safety's sake. Mail to:

The Wellington School
3650 Reed Rd
Columbus, Ohio 43220
Attn: Development