



GIFTS OF SECURITIES TO BOSTON BALLET

Gifts of Securities can provide you with valuable tax benefits while allowing you to support Boston Ballet with a charitable contribution. Shares can be transferred electronically by your broker. Notify your broker that you wish to make a gift of securities to Boston Ballet. Your broker may need written authorization from you including the name of stock and number of shares before the transfer can be made. Notify Boston Ballet to expect the transfer including name of stock(s) and number of shares, as your name may not remain attached to the securities transfer. Notifying Boston Ballet of an impending securities transfer will avoid delays in receipt, sales, and recording of your gift. Security transfer instructions may change, so it is important to verify Boston Ballet’s current information prior to each gift.

STOCK GIFTING INSTRUCTIONS

Merrill Lynch
DTC #8862
Account #5TU-04212 (N O Boston Ballet)

Merrill Lynch, Pierce, Fenner & Smith Incorporated
One Federal Street, 24th Floor
Boston, MA 02110

CONTACTS

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Boston Ballet – Ellen Miller

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PLEASE CONTACT ELLEN MILLER AT BOSTON BALLET, TELEPHONE (617) 456-6256, FOR QUESTIONS REGARDING A STOCK TRANSFER.

Please complete the information below in advance of your security transfer and email it to Ellen Miller at Boston Ballet at emiller@bostonballet.org. This will enable Boston Ballet to track your transaction, ensure that your gift account is credited properly, and promptly issue a charitable receipt for your records.

Name of Donor/Date

Purpose of Gift (Annual Fund, Ball Table, etc)

Home Address/City/State/Zip

Daytime Phone Number

Donor’s Clearing Broker Company and Contact Name

1. Name of Security and Ticker Symbol and Number of Shares

2. Name of Security and Ticker Symbol and Number of Shares

3. Name of Security and Ticker Symbol and Number of Shares