



## TRANSFER INSTRUCTIONS FOR GIFTS OF STOCK AND GIFTS OF MUTUAL FUNDS TO THE BOSTON SYMPHONY ORCHESTRA

DTC or electronic transfer is the fastest and most secure method for donating securities and mutual funds. It is a two-step process:

- 1- Please notify Maggie Zhong at [mzhong@bso.org](mailto:mzhong@bso.org) with your intention to donate securities or mutual funds prior to initiating a transfer to the Boston Symphony Orchestra. Prior notification is critical to identifying your gift of securities or mutual funds, as donor information does NOT transmit through the DTC system. In your message, please include:
  - a. Donor Name, Gift Designation, Year
  - b. Account Number
  - c. Share Quantity
  - d. Symbol
  - e. Financial Institution
  
- 2- Our brokerage account is held at First Republic Securities Company LLC (FRSC). Broker instructions to deliver shares to our FRSC account are as follows:

<b>Deliver To</b>	First Republic Securities Company LLC
<b>DTC</b>	0443 (Clearing through Pershing LLC)
<b>For Further Credit to Account Number</b>	33L190239
<b>Account Name</b>	Boston Symphony Orchestra, Inc.
<b>Reference</b>	Donor Name, Gift Designation, Year

You may also contact First Republic Securities Company (FRSC) at [onlinebrokerage@firstrepublic.com](mailto:onlinebrokerage@firstrepublic.com) with any questions. If you are unable to make the transfer via DTC, they will work with you to set up an alternate method to receive the funds.

**PLEASE NOTE:** Your donation will NOT be complete until you notify the Boston Symphony Orchestra of your intent to donate securities and until shares are received in the Boston Symphony Orchestra First Republic Securities Company (FRSC) brokerage account. The donor will be sent an official acknowledgement of the gift for tax purposes. The BSO's Tax Identification [501(c)(3)] Number is 04-2103550.

Thank you for supporting the Boston Symphony Orchestra.