



**FROM THE TOP**

www.fromthetop.org

**From the Top**  
PO Box 845429  
Boston, MA 02284-5429  
Tel: 617.437.0707

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### **Guidelines for Making a Gift of Securities**

Thank you for your interest in and support of From the Top. So that we may acknowledge your generosity and track your gift properly, please contact (or have your broker contact) Cullen Bouvier at From the Top prior to the transfer in order to provide security and donor information.

Cullen Bouvier  
From the Top  
PO Box 845429  
Boston, MA 02284-5429  
Phone: (617) 437-0707 X1  
Email: cbouvier@fromthetop.org

### **Electronic Transfer Authorization**

Your broker can electronically transfer your securities to From the Top. You must notify your broker in writing that you wish to make a gift/transfer to From the Top, specifying the number of shares and name of security or securities. (An authorization letter template follows for your use.) Please complete, sign, and send the original authorization letter to your broker, and email a copy to Cullen Bouvier cbouvier@fromthetop.org.

### **Electronic Transfer Instructions**

Receiving Firm:	<b>Merrill Lynch</b>
DTC Number:	<b>#8862</b>
Account Name:	<b>From the Top, Inc.</b>
Account Number:	<b>#818-04188</b>
From the Top Tax ID:	<b>043-583-756</b>
Merrill Lynch Contact:	<b>Sarah Szymborski – 617-946-4080 – sarah.szymborski@ml.com</b>

The gift value will be based on the average of the high and low on the legal date of the gift. The gift date is determined once the shares are irrevocable and in From the Top's name.

If your broker has questions or cannot transfer the stock electronically, please call us and we will be happy to assist you in completing your gift.

Thank you for your support!



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**GIFT OF STOCK AUTHORIZATION AND TRANSFER INSTRUCTIONS**

Donor name: \_\_\_\_\_

Donor address: \_\_\_\_\_

Donor phone: \_\_\_\_\_ Donor email: \_\_\_\_\_

**Please transfer the following securities, as a gift of unrestricted operating support, to From the Top:**

Name of security: \_\_\_\_\_ # of shares: \_\_\_\_\_

Delivering firm: \_\_\_\_\_

Firm address: \_\_\_\_\_

Broker name: \_\_\_\_\_ Phone: \_\_\_\_\_

Account name: \_\_\_\_\_

Account number: \_\_\_\_\_

Donor signature: \_\_\_\_\_ Date: \_\_\_\_\_

From the Top asks that securities be electronically transferred to its account at Merrill Lynch, according to the delivery instructions below:

Receiving Firm:	<b>Merrill Lynch</b>
DTC Number:	<b>#8862</b>
Account Name:	<b>From the Top, Inc.</b>
Account Number:	<b>#818-04188</b>
From the Top Tax ID:	<b>043-583-756</b>
Merrill Lynch Contact:	<b>Sarah Szymborski – 617.946.4080 – sarah.szymborski@ml.com</b>

**Mail/email this form to your broker, and email a copy to:**

Email: Cullen Bouvier [cbouvier@fromthetop.org](mailto:cbouvier@fromthetop.org)

Telephone: (617) 437-0707 X1

THANK YOU FOR YOUR SUPPORT!

Last Updated: 12/21/2021