



MAKING A GIFT OF SECURITIES TO THE GOVERNOR'S ACADEMY

Alumni, parents, and friends may make a gift of securities to The Governor's Academy with the transfer of stocks or bonds. A gift of long-term, appreciated securities to The Governor's Academy affords the donor both income tax and capital gains tax savings, providing the chance to support the initiatives of the Academy at a relatively low cost. An outright gift of securities, in any amount, is always a welcome gift.

Making a gift of securities to the Academy is simple. If you have questions, please call Taylor Patten at (978) 499.3124 or email tpatten@govsacademy.org.

1. If your shares are held in an account at a brokerage firm. Wire Transfer Securities which are held for you at a brokerage firm can be electronically transferred to The Governor's Academy account. They should be wired to one of the school's accounts at:

Morgan Stanley
DTC #0015
Client Account #625 828 514
Governor Dummer Academy Gift Account (*this is our legal name for 'doing business as' and the account name has not changed*)

The Governor's Academy broker:
Nathan Withington '58
Morgan Stanley Smith Barney
53 State Street, Boston, MA 02109
(617) 589.3286

Or

Vanguard Brokerage Service
DTC # --0062
Your Vanguard Brokerage Service (VBS) Account # --63733226
Account Name (not always needed but you can provide that as well)
Governor Dummer Academy – The Governor's Academy

Prior to making your gift, please contact the Academy notifying us of your gift. Be sure to include the name/type of stock, number of shares, name of the donor, and designation and date of the gift. It is helpful to have this information in writing for the proper acknowledgment and crediting of your gift.

Generally, it takes two weeks to process gifts of securities transferred via wire, after which an acknowledgement will be sent to you. The date of your gift will be the day The Governor's Academy receives it. Your gift will be valued at the mean market value on that day.