

Instructions for Transfer of Stock Gifts to the Society for Industrial Archeology

Please follow these steps when making DTC wire transfers of gifts of stock to the SIA. It is important that you notify both the SIA and Ms. Dichter of your donation so that it can be tracked and you can receive the documentation you need for your taxes.

Complete this form and send it to your broker or banker

Mail or email a copy of this completed form to

sia@mtu.edu

or

Society for Industrial Archeology

Dept. of Social Sciences

Michigan Technological University

1400 Townsend Drive

Houghton, MI 49931

ann@grandfield-dodd.com

or

Ms. Ann Dichter

Grandfield & Dodd LLC

17 Battery Place, Suite 1326

New York, NY 10004

TO: Broker/bank contact _____
Brokerage/bank name _____
Street Address _____
City, State ZIP _____

FROM: Your Name _____
Your Telephone _____

I authorize the transfer of the following securities from my brokerage/bank account number _____

To account:

Schwab Account #8894-0219
Society for Industrial Archeology #2
DTC Clearing 0164 Code 40
Charles Schwab & Co.
P.O. Box 52013
Phoenix, AZ 85072

(Security name, cusip, ticker) _____ (# of shares) _____

(Security name, cusip, ticker) _____ (# of shares) _____

(Security name, cusip, ticker) _____ (# of shares) _____

If you need additional information, please contact:

Ann Dichter
Grandfield & Dodd LLC
212 477-9626, ext. 13
ann@grandfield-dodd.com

(your signature)

(date)