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)