Brokerage Transfer Instructions for Hebrew College

To gift stock directly from a brokerage account:

1. Instruct your brokerage firm to send the gifted stock to:

   **Account Name:** Hebrew College Gift Account  
   **Account Number:** 3160-6394  
   **Brokerage Firm Name:** Wells Fargo Advisors, LLC  
   **DTC Number:** 0141  
   **Address:** The Heights Wealth Management Group of Wells Fargo Advisors  
               2 International Place 20th Floor  
               Boston, MA 02110  
               Attention: G. Brooke Heald, Financial Advisor, PIM Portfolio Manager

2. When the Transfer order is made, kindly notify one of the following individuals, giving the date and identifying the stock, so that it may be credited promptly:

   **Jan Moidel Schwartz**  
   Senior Development Officer  
   617-559-8766  
   jschwartz@hebrewcollege.edu

   **Leon Zaimes**  
   Vice President for Finance and Administration  
   617-559-8783  
   lzaimes@hebrewcollege.edu

3. Once the net proceeds and fair market value of any sale or cash gift is determined, and we are notified by First Clearing LLC., we will credit your account and prepare an acknowledgement letter. Please note that this could take several weeks, as we must receive both a confirmation and the next monthly statement of our account from First Clearing LLC., and/or Brookline Bank.