



BEVERLY BOOTSTRAPS COMMUNITY SERVICES

371 Cabot Street Beverly, MA 01915
Phone 978-927-1561 Fax 978-927-1553
www.beverlybootstraps.org

Dear Friends:

Thank you for contacting Beverly Bootstraps Community Services about a gift of stock.

Donors should be advised to communicate with the office of Beverly Bootstraps Community Services about the gift they plan to make in advance.

If you are transferring securities that are currently held by your brokerage firm, please provide them with the following information:

Raymond James & Associates
DTC Participant # 0725
FAO: Beverly Bootstraps Community Services
Account #: 19895023

This will allow your brokerage firm to properly transfer the gifts to our brokerage firm account.

If you are would like to donate a physical certificate of stock, please see below:

* Contact Deb Marcus at Marcus Financial Advisors at 978-921-1686 for instructions and required documents. This way they can inquire exactly how the certificate is registered and provide specific instructions & paperwork to the donor(s). They send the donor the stock power and Authority to Deposit form pre-populated with the right info so they don't alter the stock power or sign incorrectly.

* The donor may choose to assign a partial amount of shares to Beverly Bootstraps Community Services, rather than the full shares listed on a certificate.

Note: New industry procedures require the balance of shares must be delivered out electronically to a direct registration/book entry account in donor's name, and Tax ID number at the security's Transfer Agent. Physical certificates can be requested from the Transfer Agent, but this may not be available in all cases.

Questions may be addressed to Deb Marcus at Marcus Financial Advisors, 266 Cabot St., Beverly, MA 01915. Phone Number: 978-921-1686 (toll free 800-640-0008)

Sincerely,

Heather Johnston
Director of Donor Relations

Beverly Bootstraps Tax Id # 04-3254507