



WHITEHEAD INSTITUTE

Whitehead Institute stock gift instructions

→ Donating securities is best accomplished by electronic transfer via a broker → Following the stock transfer, please notify the Whitehead Institute Advancement Office of your donation → Questions or issues, call us at 617.324.7770

If you have appreciated securities, donating them is a great way to support Whitehead Institute while potentially avoiding capital gains taxes. Donating securities is easy and best accomplished by electronic transfer via a broker.

To make a gift of securities, please ask your broker to transfer the securities to the Whitehead Institute for Biomedical Research account at UBS Financial Services:

Account Name: Whitehead Institute for Biomedical Research

DTC#: 0221

Account #: JJ 03636

UBS Financial Services

100 Federal Street

27th floor

Boston, MA 02110

617.261.1000

800.225.2374

Following the stock transfer, please notify the Whitehead Institute Advancement Office of your donation, so that we may confirm receipt. Please include the following information:

Name of securities to be transferred

Number of Shares or Approximate Value of Donation

Transfer Date

Full Name of Donor

Gift designation, if applicable

→ Whitehead Institute Advancement Office, 9 Cambridge Center, Cambridge, MA 02142 → 617.324.7770, advancement@wi.mit.edu