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