

SIMMONS UNIVERSITY STOCK TRANSFER INSTRUCTIONS

IMPORTANT: Before the transfer takes place, please contact the Advancement Office at 800-831-4284, or by email at advgifts@simmons.edu to inform us of your gift.

The following information is required by your broker to make the transfer:

Simmons Univ. Brokerage Account

Simmons University Tax ID # 04-2103629

UBS Wealth Advice Center
1000 Harbor Boulevard, 3rd Floor
Weehawken, NJ 07086

DTC # 0221
f/b/o Simmons University
Account # 1B – D4815

Though your broker will be making the transfer, we need you to provide the following information to the Simmons University Advancement Office as soon as possible. This will ensure proper designation and acknowledgement of your gift.

- Your broker's name and telephone number
- The name of the stock being transferred
- The number of shares being delivered
- The designation of your gift

We will provide the broker with the above information so that they can identify the shares being transferred into the Simmons account. It is very important that we know who is making the gift. Occasionally, shares are transferred into the account and we have no knowledge of the source. This could cause a delay in crediting and acknowledging your gift.

Office of Advancement
300 The Fenway
Boston, MA 02115
(800) 831-4284
advgifts@simmons.edu