



PROCEDURES FOR DONATING SECURITIES TO THE MEADOWBROOK SCHOOL

If you wish to make a gift of securities to Meadowbrook, we have arranged with UBS Private Wealth Management to sell the securities for the School. The procedure is as follows:

- If the securities are held in the donor's name, the donor should endorse the certificate(s). The certificate(s) should then be sent to the School or directly to Sophia N. Morgan at UBS Private Wealth Management for subsequent sale at the address provided below.
- If the securities are held in the donor's account with a brokerage firm, the donor should direct his/her broker to transfer the shares to the UBS Private Wealth Management account for deposit into The Meadowbrook School's account for sale.
- In order to facilitate the sale of the securities, the donor should prepare a DTC letter and fax it to UBS Private Wealth Management using the fax number provided below (with a copy to the School) stating that s/he would like to donate (#) of shares of (company's name) stock to The Meadowbrook School, referencing the School's UBS account number.

UBS PRIVATE WEALTH MANAGEMENT INVESTMENT CONTACT INFORMATION

Sophia N. Morgan, Senior Registered Client Associate
UBS Private Wealth Management
200 Clarendon Street, Ste. 2400
Boston, MA 02116-5086
617-247-6225 (office)
855-215-0688 (fax)
sophia.morgan@ubs.com

DTC Number: 0221
Account Number for Meadowbrook: Y9-S3566
Tax ID Number for Meadowbrook: 04-2104720

If you have any questions, please contact John Austin, Director of Finance and Operations at Meadowbrook, 781-893-2536, jaustin@meadowbrook-ma.org or Nicola Leiter, Director of Development at Meadowbrook, 781-314-9203, nleiter@meadowbrook-ma.org.

Meadowbrook's fax number is 781-894-0057.
Meadowbrook's mailing address is 10 Farm Road, Weston, MA 02493-2479