

Hebrew College Brokerage Transfer Instructions

1. **Please instruct your brokerage firm to send your gift of stock to:**

Account Name: Hebrew College
Account Number: PWB3787
Brokerage Firm Name: UBS Financial Services, Inc.
DTC Number: 0221
Address: Lewin Wealth Management of UBS Financial Services, Inc.
One Post Office Square 33rd Floor
Boston, MA 02109
Attention: Daniel J. Lewin, Wealth Advisor,
Senior Vice President – Wealth Management

2. **When the transfer order has been made, kindly notify one of the following individuals with the date and identify the stock, so that it may be credited promptly:**

Sharon Katz
Development Operations Manager
617-559-8764
skatz@hebrewcollege.edu

Rosa Kramer Franck
Director of Development
617-559-8736
rfranck@hebrewcollege.edu

3. **Once the net proceeds and fair-market value of any sale or cash gift is determined, and we are notified by UBS, we will credit your account and prepare an acknowledgment letter. Please note that this could take several weeks, as we must receive both a confirmation and the next monthly statement of our account from UBS and/or our Brookline Bank.**