

## 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, please ask your brokerage firm to notify Sharon Katz and provide your name, the date of the transfer, the type of stock, and the number of shares, so that your gift may be credited properly. Sharon's contact information is:

Sharon Katz  
Development Operations Manager  
[skatz@hebrewcollege.edu](mailto:skatz@hebrewcollege.edu)  
617.559.8764

3. Once we have been notified by UBS that the transaction is in progress and we have received the net proceeds, we will credit your account and prepare an acknowledgment letter for your records. Please note that it sometimes takes a few weeks for us to receive all of the documentation we need for your gift.

Thank you for your generous support!

Updated September 2025