



Ursuline Academy

Stock Transfer Instructions

1. Please provide Ursuline Academy with the following information:
 - Name of the stock;
 - The number of shares being transferred; and
 - The brokerage firm transferring the stock.
2. Please provide your broker or transfer agent with the following information:
 - Transfer shares to **Fidelity Investments**
 - Beneficiary **Ursuline Academy Dedham, Inc.**
 - DTC Number: **0226**
 - Account Number: **676586620**
 - Attention: **Lorraine Koblantz**
 - Phone: **(781) 235-6323**
 - Fax: **(781) 235-6037**

3. If you have questions, please contact:

Joe Ziska
Chief Advancement Officer
Ursuline Academy
Phone: (781) 493-7711
jziska@ursulineacademy.net

or

Leigh Ann Luetzen
Controller
Ursuline Academy
Phone: (781) 493-7708
lluetzen@ursulineacademy.net

4. It is the practice of Ursuline Academy that all stock transfers will be sold upon receipt.

The value of the stock will be based on the **average market value** for the stock on the day that it was transferred. All Securities will be sold upon receipt.