



# WESTOVER SCHOOL

## Stock, Mutual Fund, and Wire Transfer Information - Domestic

To facilitate the transfer, please contact the Office of Advancement at (203) 577-4646 or [alumnaedevelopment@westoverschool.org](mailto:alumnaedevelopment@westoverschool.org) and let us know a gift is on the way. Please include:

1. The account name making the donation,
2. The name of the security and associated symbol or CUSIP, and
3. The number of shares (for stocks, ETFs, and bonds) being donated before you initiate the transfer.
4. For mutual funds, please provide the fund name, fund ticker symbol, and number of shares/units.

*Please note: Our brokerage account is held at National Financial Services (NFS), a wholly owned subsidiary of Fidelity Investments. City National Securities is designated as the introducing broker dealer.*

### Stock Gifts:

If the security is eligible for electronic transfer by The Depository Trust Company (DTC) instruct your broker to deliver the assets using the following instructions:

DTC: 0226, National Financial Services | Further credit to account #: NYK – 004070

Account Name: Westover School – Gift

Securities registered in book form/street name at a broker can be delivered to:

City National Securities | DTC #0226 NFSC

Further credit to account #: NYK – 004070

Account Name: Westover School – Gift

*The Gift Date is the date of receipt in the brokerage account.*

### Mutual Funds:

Please direct your broker (if funds are held in a brokerage account) or mutual fund company (if funds are held directly at the mutual fund company) to call the NFS TOA (transfer of assets) Receives Department using the Fidelity Clearing & Custody Solutions® support line at 877.262.5950.

Further credit to account #: NYK – 004070

Account Name: Westover School – Gift

### Bank Wires:

BankUnited  
Miami Lakes, FL  
ABA/Routing Number: 2670-9059-4  
Account Number: 9854081380  
Westover School  
1237 Whittemore Road  
Middlebury, CT 06762

Westover School  
1237 Whittemore Road | Middlebury, CT 06762 | (203) 577-4646  
[alumnaedevelopment@westoverschool.org](mailto:alumnaedevelopment@westoverschool.org)

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