



Monarch School of New England

Unlimited possibilities
for students with special needs.

Gifts of Stocks and Securities:

To transfer stocks and securities:

1. Please notify the Monarch School of New England of your intention to make a gift. Please provide the name of the stock and number of shares, as well as the purpose of the gift (ex: programs, annual appeal). When stocks are transferred into our account, we are not provided with donor information. Letting us know about your generous gift will help us make sure that it is correctly applied. Thank you!

Notifications (or questions) can be sent to:

Amanda Martineau, Director of Community Engagement
Monarch School of New England
PO Box 1921
Rochester, NH 03867
Phone: 603-332-2848
Email: amartineau@monarchschoolne.org

2. After you have notified us about your gift, please provide your broker with the following information to facilitate the transfer:

Cetera Investment Services (Bank of New Hampshire)
11 Triangle Park Drive
Concord, NH 03301

Account Manager: Jason Bolduc
Phone: 603-230-4211
Email: jason.bolduc@ceterais.com

DTC #: 0701
Monarch School of New England Account #: 5LX16353
Monarch School of New England Tax ID#: 02-0315196

Note: The date of your gift is when the holdings move out of your account and the value is determined by an average of the high and low listings for the stock on that day. It is the Monarch School of New England's practice to sell the stocks immediately upon receipt.