

**NANTUCKET HISTORICAL ASSOCIATION**  
**Instructions for**  
**Donations of Stocks or Securities**

***WIRE TRANSFER (PREFERRED METHOD)***

1. Complete the **Statement of Intent** indicating that you intend to give a designated number of shares of a specific stock to the Nantucket Historical Association. Return the completed form by mail, fax, or email to the External Relations Department. For additional information, please contact:

Mrs. Judith Wodynski,  
Director of External Relations  
Nantucket Historical Association  
P.O. Box 1016  
Nantucket, MA 02554  
Phone: (508)-228-1894, ext. 111  
Email: [jwodynski@nha.org](mailto:jwodynski@nha.org)

2. Ask your broker to send the stock via DTC (Depository Trust Company) to the account of the Nantucket Historical Association (#0418) at:

**Smith Barney, Inc.**  
**DTC #0418 — Account # 370-48925-16-402**  
Mr. Bruce Bates  
Smith Barney, Inc.  
360 Linden Oaks  
Rochester, NY 14625

For questions concerning wire transfers, please call Bruce Bates at (585)-389-2200.

***WRITTEN TRANSFER***

1. Complete the **Statement of Intent**, as stated above, and return it to the External Relations Department.
2. Sign a stock power for each certificate.
3. Send the Statement of Intent and stock power together in an envelope using registered mail, or deliver them to the Nantucket Historical Association, 15 Broad Street, Nantucket, MA 02554.
4. In a separate envelope, send the stock certificates (NOT SIGNED) using registered mail, or deliver them to the External Relations Department at the above address.
5. The date of the gift is determined by the postmark on the envelope or the date of delivery of the stock.

***FOR TAX PURPOSES***

The value of a gift is legally established by the date on which you make the transfer to the Nantucket Historical Association (postmark date of mailed certificates or date of receipt of the delivered or wire-transferred certificates) and the selling price of the stock on that day.

**NANTUCKET HISTORICAL ASSOCIATION  
STATEMENT OF INTENT  
Donations of Stock or Securities**

**The following information must be completed in order to process any gifts of stock or securities to the Nantucket Historical Association.**

***DONOR INFORMATION***

Name \_\_\_\_\_

Mailing Address \_\_\_\_\_

\_\_\_\_\_

Phone (\_\_\_\_) \_\_\_\_\_ (\_\_\_\_) \_\_\_\_\_  
HOME BUSINESS

***GIFT INFORMATION***

Please be advised that I/we intend to donate to the Nantucket Historical Association \_\_\_\_\_  
shares of \_\_\_\_\_  
QUANTITY  
NAME OF STOCK/SECURITIES

Please apply this gift to the following designated purpose (please circle):

**Membership - Annual Fund - Capital Campaign - Other**

Additional instructions \_\_\_\_\_  
\_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

**Please return this completed form by mail or fax to the External Relations Office prior to the stock transaction to ensure complete and accurate processing of your gift.** If you have any questions, please call the External Relations Department at (508) 228-1894, ext. 111 or 114, or email [jwodynski@nha.org](mailto:jwodynski@nha.org).

**Mail:** Mrs. Judith Wodynski  
Director of External Relations  
Nantucket Historical Association  
P.O. Box 1016  
Nantucket, MA 02554

**Delivery:** Mrs. Judith Wodynski  
Director of External Relations  
Nantucket Historical Association  
15 Broad Street  
Nantucket, MA 02554

**Fax:** (508) 228-5618