



## Donor Instructions for Gifts of Securities to The Sage School

171 Mechanic Street, Foxboro, MA 02035 • Phone: 508-543-9619 • Fax: 508-543-1152

Below are instructions for donating gifts of stock to The Sage School (Sage Center for Learning Inc.) Please forward these instructions to your broker's office. Most securities are DTC eligible and should be sent using the instructions directly under "DTC Eligible Securities."

**Prior to transferring securities:** Please provide the following information to The Sage School (Sage Center for Learning Inc.) and RBC Wealth Management using the contact information at the bottom of the page:

Donor Name(s): \_\_\_\_\_  
Broker's Name: \_\_\_\_\_ Firm: \_\_\_\_\_  
Broker's Phone: \_\_\_\_\_ Broker's Fax #: \_\_\_\_\_  
Brokerage Firm's DTC #: \_\_\_\_\_ Date of Transfer: \_\_\_\_\_  
Name of Security: \_\_\_\_\_ # Shares: \_\_\_\_\_  
CUSIP#/Ticker Symbol: \_\_\_\_\_

### DTC Eligible Securities:

**Note: Please notify The Sage School (Sage Center for Learning Inc.) and RBC Wealth Management prior to transferring securities.** (Contact information provided below.) Please include the donor's name when affecting the transfer.

DTC Clearing Number: 0235  
For the account of: Sage Center for Learning Inc.  
Account #: 30139486

### Physical Stock Deliveries: *(please include our account number when mailing stock)*

RBC Wealth Management  
For the account of: Sage Center for Learning Inc.  
510 Marquette Avenue South  
Attn: M08 – Acct Trf  
Minneapolis, MN 55402-1106

### Fed Fund Wire Instructions for Gifts of Cash:

ABA#: 091000022  
Bank: US Bank  
Beneficiary Account: 160230097208/RBC Wealth Management  
For Further Credit to:  
Final Beneficiary: Sage Center for Learning Inc.  
Final Beneficiary A/C#: 30139486

### Contact Information:

**The Sage School (Sage Center for Learning, Inc.)**  
Shelley Reese Cornish  
Phone: 508-543-9619, Ext. 107  
Fax: 508-543-1152  
Email: [scornish@sageschool.org](mailto:scornish@sageschool.org)

**RBC Dain Rauscher Inc.**  
Broker: John White  
Phone: 877-681-7810  
Fax: 781-681-7801  
Account #: 30139486