



Procedures for the Transfer of Securities to the Vermont Symphony Orchestra

Thank you for considering making a gift of securities to the Vermont Symphony Orchestra! Please notify the Orchestra's Director of Development (Devon Cooke) at 802-864-5741 ext. 125 before initiating such a gift to be sure the transfer is made as quickly as possible and to ensure that your gift is properly credited.

Please follow these instructions. If you have any questions, please contact the Orchestra's Investment Advisor, Elizabeth Lewis at Maple Capital Management at (802) 229-2838.

I. If the securities are held in "Street Name" at another brokerage firm or a bank:

Please authorize your firm to transfer the shares as follows:

Charles Schwab & Co., Inc
DTC # 0164
Account # 1266-7514
Vermont Symphony Orchestra Association Inc

II. If the securities are held in a Schwab Account:

Please send written authorization to your financial advisor to journal the gift from their account to:

Account # 1266-7514
Vermont Symphony Orchestra Association Inc

III. If the securities are Mutual Funds:

Each mutual fund company has its own procedures. Please contact Kara Simanskas at Maple Capital Management (802-229-2838) with the name of the mutual fund company so we can find out specific instructions to transfer and/or liquidate a specific mutual fund.

Checks must be payable to VSO or Vermont Symphony Orchestra. When we receive the check, we want to send it to directly to Josh at MCM with a quick letter typed up saying it's for the endowment account. Account number can go on the memo line.

Please contact Devon Cooke or Maple Capital Management if the security you wish to gift is in an alternate form (i.e. physical stock certificate).

We are grateful for your support!