

Gettysburg College
Gift Delivery Instructions for Charitable Gift Annuities and Charitable Remainder Trusts

Gettysburg College works closely with State Street Global Advisors (SSgA) to provide both the College and our donors with the highest level of service for life income arrangements. We want the transfer process to be as smooth, convenient, and obstacle-free for you as possible. Unlike other gifts to the College, please send your life income gift directly to State Street using the following instructions.

We will alert State Street of the expected transfer once we hear from you about your intended gift.

Please call Mickie Woodward in the planned giving office at 800-238-5528 if you have any questions and for the Gettysburg College Federal Tax ID Number. Thank you.

Account Transfer Information

Cash

Checks to: Merrill McCarthy
Fed-Ex St address Charitable Asset Management
 State Street Financial Center
 One Lincoln Street – 24th Floor
 Boston, MA 02111-2900

Wires to: D State Street Bank and Trust Company, Boston, MA
 ABA Routing #: 011-000-028
 To a/c #**5673-032-8 (Reconciliation Clearance)**
 For a/c #
 Account name:

DTC-Eligible Securities (for transfer electronically via the Depository Trust Co. system)

DTC Participant #987

Charitable Asset Management
State Street Financial Center
One Lincoln Street
Boston, MA 02111-2900
For a/c #
Account Name:

Physical Form Securities

By U.S. Postal Service or Federal Express

Attn: Donna Merrill McCarthy
Charitable Asset Management
State Street Financial Center
One Lincoln Street – 24th Floor

Boston, MA 02111-2900
(Stock/bond powers should be sent under separate cover)*

Federal Reserve Securities

By Federal Reserve Wire to:

STATE ST BOS/SPEC/BJ50/(a/c#)

Account name:

ABA Routing #011000028 (Free Delivery)

NOTE: Please be advised that ***the date of gift of the electronically transferred securities is determined at the time it enters one of the College's brokerage accounts, which may or may not be the same day you instruct your broker to make the transfer.*** As there are several steps and persons involved, transfer times can vary from same day to up to 5 days, especially during certain periods such as end of the calendar year. ***The value is generally determined as the average of the high and low prices on the date of the gift.***