

# DEPOSITORY TRUST COMPANY (DTC) TRANSFER INSTRUCTION SHEET

## IMPORTANT

**1** Please complete this form and forward it to your financial adviser.

**2** Please also forward a copy of this form to the Office of Development via email: [dev@amnh.org](mailto:dev@amnh.org) / Fax: 212-469-3605 as donor information does not always transmit through the DTC wiring systems

If you have any questions, please contact our Development office at 212-769-5160 or email: [dev@amnh.org](mailto:dev@amnh.org)

\_\_\_\_\_  
TO (DONOR'S FINANCIAL ADVISER)

\_\_\_\_\_  
TELEPHONE FAX

Please use this form as authorization to transfer the securities listed below from my account to J.P. Morgan Chase as my gift to the American Museum of Natural History.

\_\_\_\_\_  
FROM (DONOR NAME)

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
TELEPHONE

\_\_\_\_\_  
NAME OF SECURITY

\_\_\_\_\_  
NUMBER OF SHARES

\_\_\_\_\_  
GIFT PURPOSE

\_\_\_\_\_  
WHO, IN ADDITION TO THE LEGAL DONOR SHOULD RECEIVE RECOGNITION FOR THIS GIFT?

\_\_\_\_\_  
SIGNATURE

## DTC Transfer Instructions for Financial Advisors

For gifts of securities to the American Museum of Natural History, please deliver by DTC to:

**J.P. Morgan Chase**  
**DTC # 0902**  
**SWIFT (70E) contains DNR or DONOR Credit to American Museum of Natural History Account # P26031**

For gifts made from mutual funds to the American Museum of Natural History, please deliver by DTC to:

**Merrill Lynch**  
**DTC # 8862**  
**Credit to American Museum of Natural History Account #85202M53**

**\*Please call the office if BIN number is required.**

## IMPORTANT

For proper donor recognition, transfers must include the following information:

- Donor's name and address
- Name of security and number of shares
- Purpose of gift
- If applicable, additional names for joint recognition

Please note:

- For stock gifts used to fund an annuity or trust, please call our Planned Giving office at: 212-769-5119/or email: [plannedgiving@amnh.org](mailto:plannedgiving@amnh.org)
- If you wish to transfer physical certificates, please call 212-769-5160