

HOW TO GIVE SECURITIES TO



Tax I.D. # XX-XXXXXX

1. STEP ONE: Please notify Connie M. Hartley, Executive Director, of your intended stock gift at 207-729-7736.

2. STEP TWO: Prior to actual transfer, please call (or have your broker call) D.J. Shaughnessy (800-356-1781 x110) at F.L. Putnam Investment Management Company with:

- a) your name;
- b) broker's name, firm, and direct phone number;
- c) name of securities;
- d) approximate number of shares;
- e) approximate value of securities; and
- f) expected date of transfer;

Please instruct your broker/advisor to include your name when transferring the securities. "Blind" stock gifts that don't carry the donor's name may sit unclaimed and delays your acknowledgement.

3. STEP THREE: Please have your broker transfer the stock to the BBBS of Brunswick/Bath account as follows:

BROKER DELIVERY INSTRUCTIONS:

Custodian: Charles Schwab
Deliver to: DTC# 0164
Account # XXXX-XXXX
Donor Name: Your Name/Client Name
For the Account of: BBBS of Brunswick/Bath

We will send an acknowledgment letter within one week of the receipt of stock. For tax purposes, your gift will be valued at the average of the high and low prices on the date Brunswick-Bath BBBS assumes ownership of the stock.

Questions? Please call D.J. Shaughnessy with F.L. Putnam Investment Management at 800-356-1781 x110

Thank you!