



Making an Outright Gift of Stock to
Regis College through a Broker

Important: Before the transfer takes place, please contact the Office of Institutional Advancement at 781-768-7240 to inform us of your gift.

The following information is required by your broker to make the transfer to Regis College.

Regis College Brokerage Information

Madeleine Scanio
Client Associate Global Institutional Consulting
Bank of America Merrill Lynch
7501 Wisconsin Avenue Suite W600
Bethesda, MD 20814
T: 301-215-4418
Madeleine.Scanio@ml.com

Mark Randall, CFA®, CIMA®, CAIA
Vice President Investment
Associate Global Institutional Consulting
Phone: 301-215-4446; Fax: 301-710-5075
Mark.Randall@ml.com
7501 Wisconsin Avenue Suite W600
Bethesda, MD 20814

Merrill Lynch DTC Number: 8862
Account Number: 5TL-03108
Client Name: Regis College
Tax ID # 042-104451

Though your broker will be making the transfer, we need you to provide the following information to the Office of Institutional Advancement as soon as possible. Please fill in the information below and return this form to the Office of Institutional Advancement as soon as possible. You can either fax the form to 781-768-7226, or email it to teresa.oneil@regiscollege.edu.

- Your Broker's name _____
- Name of Firm _____
- Broker's Phone & Fax # _____
- Name of Stock being Transferred _____
- Number of shares being delivered _____
- Designation for your gift _____

We will provide our broker with the above information so that our broker can identify the shares being transferred into the Regis account. It is very important that we know who is making the gift. Occasionally, shares are transferred into the account and we have no knowledge of the source. This could cause a delay in crediting and acknowledging your gift.

We thank you very much for your gift!

Your name _____ Phone # _____

Address _____ Fax # _____

City/State/Zip _____

Regis College only:
Confirmation Date of Transfer _____ **By:** _____