



WESTOVER SCHOOL

STOCK, MUTUAL FUND, AND WIRE TRANSFER INFORMATION DOMESTIC

Stock Gifts:

Depository Trust Company (DTC) Information:

BMO Harris Bank N.A.

DTC ID: 0992

Westover School Gift Account at BMO Harris Bank: 98-711495051

Contact: Joseph Brzycki, BMO Harris Bank N.A., Milwaukee, WI

P: 414.287.7317 / Email: joseph.brzycki@bmo.com

As an alternative, gifts of physical stock certificates should be mailed directly to our account administrator's attention at:

BMO Not-for-Profit Services

Attn: Joseph Brzycki

111 East Kilbourn Ave., Suite 200

Milwaukee, WI 53202

The official gift date is the date the shares arrive in Westover's account.

Donor names are often not included with the notifications Westover receives for stock gifts. Please contact the Alumnae and Development Office at (203) 577-4646 or alumnaedevelopment@westoverschool.org to let us know a gift is on the way.

Mutual Fund Gifts:

1. Contact FIS Wealth Outsourcing Solutions - Mutual Fund Department to initiate the transfer.
2. FIS will work with Reliance Trust Company and BMO Harris to complete the transfer. BMO Harris will notify Westover School when completed.

FIS Wealth Outsourcing Solutions – Mutual Fund Department

Contact: Robert Logemann

P: 920.497.5274 / Email: WOS_MKE_Mutual.Fund.Transfers@fisglobal.com

Depository Trust Company Info: Reliance Trust Company, DTC ID 5409

Westover School Gift Account at BMO Harris Bank: 98-711495051

Wire Instructions:

BankUnited

Miami Lakes, FL

ABA/Routing Number: 2670-9059-4

Account Number: 9854081380

Westover School

1237 Whittemore Road

Middlebury, CT 06762

If you have any questions contact the Alumnae and Development office at (203) 577-4646 or alumnaedevelopment@westoverschool.org.

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