



Instructions for making a Charitable Gift with Stock

1) Transfer securities directly to Wheeler's broker:

Karen Emma
Universal Wealth Management
945 Reservoir Avenue
Cranston, RI 02910

Toll Free Phone: (877) 782-2855 or Direct Phone: (401) 331-7600

Email: Karen@universalwm.com

Wheeler Account #: 037-660313
DTC#: 0443
Wheeler Federal Tax ID #: 05-0259101

2) Notify the Wheeler contacts below, as well as Universal Wealth Management, with the stock NAME and NUMBER of share(s) being gifted:

1. Michele Sczerbinski Diaz '86, Senior Director of Philanthropy & Engagement
(401) 528-2132, michelediaz@wheelerschool.org
2. Ky Wier, Gift Processing Associate
(401) 528-2181, kywier@wheelerschool.org

Important Information

All securities must be transferred into Wheeler's name prior to being sold; otherwise, the donor will be responsible for paying capital gains tax on the appreciated asset(s).

You or your Advisor must notify Wheeler and Universal Wealth Management when you are making a transfer. Due to security regulations, there are no individual names associated with an account on a stock gift, therefore it is essential that you notify us so we may properly thank and credit you for your generous donation.