



**DTC Instructions for Transferring Securities (stocks, bonds, & marketable assets)**

Please use the instructions below to transfer assets to the Maine Humanities Council account at **Charles Schwab**:

Broker: HeadInvest  
Account Reps: Odette Thurston and Matthew Civello  
PHONE: (207) 773-5333  
EMAIL: [othurston@headinvest.com](mailto:othurston@headinvest.com) and  
[mcivello@headinvest.com](mailto:mcivello@headinvest.com)

DTC #: 0164, Code 40  
MHC Account #: 7427-7812

When transferring stock to the Maine Humanities Council, please request that your broker attach a trailer to the transaction stating your name.

Please also ask your broker to notify the Development Office ([diane@mainehumanities.org](mailto:diane@mainehumanities.org)) of your stock transfer so that we may appropriately credit and acknowledge your generosity. Please include the following information:

- Name of stock(s) transferred
- Number of shares (or approximate value) you wish to give
- Approximate date of transfer, and
- Whether your gift is unrestricted or should be applied to a defined Fund.