

HOW TO DONATE STOCK GIFTS TO BOSTON LYRIC OPERA

BLO welcomes gifts of stock. Making a stock gift is an excellent way to reduce your tax liability while supporting the Company. To ensure a successful stock transfer, please have your stockbroker notify the following parties in writing, preferably at the email addresses listed below, about the intended stock gift and include the following information:

- Donor name
- Name of stock
- Number of shares
- Intended gift date
- Allocation of gift

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Boston Lyric Opera
11 Avenue de Lafayette
Boston, MA 02111-1736
Phone: 617.542.4912 x2350
Fax: 617.542.4913
Email: donorservices@blo.org

Canaccord Genuity
c/o Martin Fennelly
99 High Street, Suite 1200
Boston, MA 02110
Phone: 617.788.1507
Fax: 617.371.3796
Email: mfennelly@canaccordgenuity.com
DTC Number: 0443
Account Number: JZJ150535

*Please note that it is our policy to only sell stock once we have confirmed the donor's identity. This is done so that no stock transferred into our account in error, is sold. The easiest way for us to receive stock is if the donor/broker informs us over the phone or via e-mail of the donor name, shares, stock type, and date, **before the transfer**. This allows us to immediately sell the stock when we receive it. Informing us via letter after the transfer can cause a delay in selling of the stock. After one week, if we have not been informed of the donation and are unable to determine the donor, BLO will return the stock to the account from which it came and request that it be resubmitted with a name.*