



# HARVARD MEDICAL SCHOOL

617-384-8500

## GIFT INSTRUCTIONS

*Donors and/or their financial advisors should follow these guidelines for making a gift to Harvard Medical School.*

### STOCK/SECURITIES

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To make a gift of stock/securities to Harvard Medical School, please contact Harvard Management Company (HMC) directly:

**Harvard Management Company**, Trusts and Gifts Department  
600 Atlantic Avenue, Boston, MA 02210-2203  
Phone: 866-845-6596  
Fax: 866-457-6598  
Email: [security\\_gifts@hmc.harvard.edu](mailto:security_gifts@hmc.harvard.edu)

Once the wire transfer arrangements have been made, please notify the donor's HMS Gift Officer and please provide the following information to Susan Carr, senior gift operations coordinator, at [susan\\_carr@hms.harvard.edu](mailto:susan_carr@hms.harvard.edu):

Name/location of firm or broker handling the stock transfer  
Name of the securities, number of securities, and value of shares (gift amount)  
Date of transfer  
Name of the HMS fund the gift is supporting

### BANK WIRE

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Gifts to Harvard University via bank wire transfer should be sent to the following account:

Bank of America, 100 Federal Street, Boston, MA 02110  
**President and Fellows of Harvard College, ADS account**  
Account #: 9429263621  
Ach ABA: 011000138  
Wire ABA: 026009593  
Swift Code: BOFAUS3N

Once the wire transfer arrangements have been made, please notify the donor's HMS Gift Officer and please provide the following information to Susan Carr, senior gift operations coordinator, at [susan\\_carr@hms.harvard.edu](mailto:susan_carr@hms.harvard.edu):

Name/location of bank sending the transfer  
Amount of gift / Date of transfer  
Name of the HMS fund, program, or research area the gift is supporting

### CHECK

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Please make check payable to the **President and Fellows of Harvard College**. If possible, please draw from a U.S. bank, in U.S. currency. Please be sure to indicate the name of the fund your gift is supporting.

**Gift checks should be mailed to:**

**Harvard Medical School**, Alumni Affairs and Development  
P.O. Box 419720, Boston, MA 02241-9720

### LIFE INCOME GIFTS—Charitable Gift Annuity & Charitable Remainder Trust

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Checks for Life Income gifts (**CGAs & CRTs**) should be sent to:

**Harvard University Planned Giving**  
Attn: Kara Morin  
124 Mt. Auburn St.  
Cambridge, MA 02138

### CREDIT CARD

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**Credit Card gifts must be made online** at: <https://hms.harvard.edu/give>. Please be sure to indicate the name of the HMS fund that your gift is supporting. Harvard University accepts MasterCard, VISA, American Express, and Discover cards.

***All gifts to Harvard Medical School are tax-deductible to the extent provided by law.***

*We affirm that no goods or services exceeding the IRS provisions are provided in consideration of charitable gifts to Harvard University.*

*Please consult your tax advisor for details. **Harvard University's Tax ID Number is: 042103580.***