

Giving the Gift of **STOCK AND SECURITIES**

Thank you for considering a gift to the Alpha Kappa Alpha Educational Advancement Foundation, Inc.® Please see the information below regarding stock gifts.

Brokerage Firm

Merrill Lynch Wealth Management
The Jennings Wohl Group
Merrill Lynch, Pierce, Fenner and Smith Inc.
39001 W. 12 Mile Rd. Farmington Hills, MI 48331

Account Information

DTC# 8862
Account Number: 8WA-02015
Account Title: AKA Educational
Advancement Foundation



Effective Date and Value of Your Gift

Your gift of stock or publicly traded securities will be valued based on the mean market price of the securities on the gift date. The Educational Advancement Foundation determines your gift date according to the following guidelines:

- By mail, it is the later of the postmark dates of your separately mailed stock certificates and stock powers.
- By electronic transfer, it is the date that the securities enter EAF's account.



Prior to transfer, please complete the bottom portion of this form and email it to Rachel Dixon, rdixon@akaeaf.net so that we may properly credit our records and provide an official receipt for tax records once the stock has been liquidated.

GIFTS CAN BE MAILED TO:

Educational Advancement Foundation, Inc. / EAF
5656 South Stony Island Avenue | Chicago, IL 60637

(please print or type)

DONOR INFORMATION

DONOR NAME:

EAF FUND (GENERAL OR ENDOWMENT NAME):

NAME OF STOCK:

OF SHARES:

TRANSFER DATE:

RETURN FORM TO: RACHEL DIXON

BY MAIL: Educational Advancement Foundation / EAF, Attn: Rachel Dixon
5656 South Stony Island Avenue | Chicago, IL 60637

BY EMAIL: rdixon@akaeaf.net
BY FAX: 773-947-0277

OR SUBMIT ELECTRONICALLY – CLICK SUBMIT TO SEND FORM >>

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