



**Triangle**  
Social.Professional.STEM  
Education Foundation

## Appreciated Securities Transfer Form

Print Name: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

I. It is my intention to gift appreciated securities with an approximate value of

\$\_\_\_\_\_ for the following purpose(s):

\_\_\_\_\_ Unrestricted

\_\_\_\_\_ Current support restricted to: \_\_\_\_\_

\_\_\_\_\_ Restricted support (an endowment) to the following program area:

\_\_\_\_\_ Named Scholarship or Leadership Award (min. \$25,000)

\_\_\_\_\_ Chapter Endowment/ Scholarship Fund (for \_\_\_\_\_ Chapter)

\_\_\_\_\_ Other:  
\_\_\_\_\_

II. Chapter/School: \_\_\_\_\_ Year of Initiation: \_\_\_\_\_

III. \_\_\_\_\_ I will instruct / have instructed my broker to transfer \_\_\_\_\_ shares of  
\_\_\_\_\_ stock to an account at the following address:

Triangle Education Foundation  
c/o Charles Schwab & Co., Inc.  
AS Document Control  
PO Box 982600  
El Paso, TX 79998-2600  
Contact: Bradford Vannelli  
(313) 944-0183 or bvannelli@transcendcapital.com  
Account #: 6606-1092      DTC #: 0164, Code 40

IV. Please contact my stockbroker if necessary to confirm the transaction.

Broker Name: \_\_\_\_\_ Phone: \_\_\_\_\_ E-Mail: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

# Appreciated Securities Transfer Procedures

1. Note that the form has four areas to complete:
  - I. Approximate Value and Restrictions (if applicable).
  - II. Personal Information (to ensure that your gift can be identified).
  - III. Number and Description of the Securities. (The account information provided is needed by your broker to complete the transaction.)
  - IV. Contact Information for your Stockbroker.
  
2. Once you have completed the form, please email, fax or mail copies to:
  - a. Triangle Education Foundation  
Scott Bova, CFRE, President  
(317) 705-9803 (direct)  
sbova@triangle.org
  - b. Your stockbroker to confirm the transfer
  
3. The Triangle Education Foundation will call or email you directly to verify that the transaction has taken place. If you do not receive a call within 48 hours after the transfer, please contact Scott Bova at (317) 705-9803 or at sbova@triangle.org.
  
4. The Triangle Education Foundation is most grateful for your thoughtful gift and will send a letter of acknowledgment.

## Contact Information:

Triangle Education Foundation  
Attn: Scott Bova  
120 S. Center Street  
Plainfield, IN 46161  
Federal Tax Identification # 23-7063427

**For further information, contact the Triangle Education Foundation  
at [www.triangleef.org](http://www.triangleef.org), sbova@triangle.org or (317) 705-9803.**