



## 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 UBS Financial Services  
2301 W Big Beaver Rd; Suite 800  
Troy, MI 48084  
Attention: Bradford Vanelli  
Account #: DE42620 DTC #: 0221

IV. Please contact my stock broker 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 Stock Broker.
  
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)  
317/837-9642 (fax number)  
sbova@triangle.org
  - b. Your stock broker 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.

Triangle Education Foundation Contact Information  
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.