

NATIONAL ACADEMIES

Sciences Engineering Medicine

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Before donating stock, please inform the Office of Development by completing and returning this Notice of Intent to Transfer Stock form to Shawn Neil (contact information above).

NOTICE OF INTENT TO TRANSFER STOCK

Donor Information

Name(s) (Please Print): _____

Address: _____

Street

City

State

Postal Code

Telephone: () _____ E-mail: _____

Gift Designation/Purpose

- ☐ NAS Annual Fund ☐ NAE Independent Fund ☐ NAM Annual Fund
Committee on Human
☐ Rights ☐ Other (specify): _____

Special Instructions/Requests: _____

Gift Information

Name of Security: _____ Number of Shares: _____

Transferring Broker Information

Broker/Contact Person: _____ Telephone: () _____

Please give your broker the following transfer instructions:

Electronic Transfer of Stock (easiest and safest method)

NAS, NAM, and NRC: The Vanguard Group:

Account #: 41299008	DTC #: 0062	Tax ID #: 53-0196932
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NAE Fund: Merrill Lynch: (800) 926-1111

Account #: 5F7-62207	DTC #: 8862	Tax ID #: 23-7284092
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Mailing Stock Certificate(s):

Please mail your stock certificate(s) directly to the Office of Development - **do not sign the certificate(s)**. In a separate envelope, please mail us a signed and dated stock power form (available from your attorney or stockbroker) for each certificate. If two names appear on the certificates, the stock power must contain both signatures. Mailing the unsigned stock certificate(s) and the signed stock power form(s) separately helps to prevent theft. We recommend using certified mail/return receipt requested, and retain the date-stamped receipt for your tax records.

****Your stock(s) is valued as the average of the high and low prices on the date of transfer – this is the date the stock was electronically transferred to the Academy or the date stamped on the U.S. Postal Service certified mail receipt.****