

# Gifts of Security Transfer Instructions

Thank you for your interest in making a charitable gift in the form of a Security Transfer. Please note that you must initiate all security donations with your broker; please consult your broker to ensure that the stock is eligible for electronic delivery over the Deposit Trust Company (DTC) system. (This is the fastest, most secure, and most cost-effective method of donating securities.)

Acknowledgment will be made in compliance with IRS regulation. Please consult with your tax adviser before making a charitable donation to any charity.

Please complete (or request that your broker complete) the information below to help ensure that your gift is processed accurately. Once you've made a transfer, please contact Kristy White at 919-865-5086 or [kwhite@autismsociety-nc.org](mailto:kwhite@autismsociety-nc.org) to inform the Autism Society of North Carolina of the proposed donation and to ensure that you receive a prompt receipt of your gift for your tax records.

## Donation is made to:

The Autism Society of North Carolina, Inc. at Vanguard (Account #62768006)

Your gift will specifically support programs and operations conducted by The Autism Society of NC, Inc.

## Donor & Securities information:

\_\_\_\_\_  
Name & type of securities (e.g. DELL common stock)

\_\_\_\_\_  
Donor telephone/email (to be used only if a question arises in the process)

\_\_\_\_\_  
Security symbol

\_\_\_\_\_  
Broker name

\_\_\_\_\_  
Number of shares

\_\_\_\_\_  
Broker company/city/state

\_\_\_\_\_  
Transfer date

\_\_\_\_\_  
Broker contact/telephone

\_\_\_\_\_  
Donor name (individual, corporation, foundation)

If this gift is being made in support of a Run/Walk for Autism participant, list their name: \_\_\_\_\_

\_\_\_\_\_  
Donor address/city/state/ZIP

## Specific Processing Procedures

DTC Eligible Securities: Deliver to DTC Clearing Number 0062

Please reference: "DONOR NAME" to ensure your donation is properly credited.

\_\_\_\_\_  
Donor signature

\_\_\_\_\_  
Date signed

\_\_\_\_\_  
Donor signature

\_\_\_\_\_  
Date signed

*Note: All account owners must sign this request (e.g. an individual account would require one signature; a Joint Tenants in Common account would require two signatures)*

For Gifts of Stock not held in a brokerage account or for gifts of Restricted Stock, please contact the Autism Society of North Carolina:

Autism Society of North Carolina  
Attn: Kristy White, Chief Development Officer  
5121 Kingdom Way, Suite 100  
Raleigh, NC 27607  
919-865-5086  
[kwhite@autismsociety-nc.org](mailto:kwhite@autismsociety-nc.org)