

Educational Foundation of Alpha Gamma Rho

Gift of Stock Transfer and Sale Procedures

3 ways to make your gift of stock

1. If stock is in individual's name, the donor needs the *Ownership Disclaimer* form completed with quantity and description, then date and sign and have notarized; as well as an *Irrevocable Stock or Bond Power* form to be signed only and have signature notarized; return to AGR with the stock certificate (without any marks or signature on the certificate) and a letter indicating a gift of stock is being made to the Foundation.
[AGR will send a completed resolution to Merrill Lynch.]
2. If stock is in Educational Foundation's name the donor needs to sign the *Irrevocable Stock or Bond Power*, write nothing else on form, return to AGR with stock certificate (without any marks or signature on the certificate) and a letter indicating a gift of stock is being made to the Foundation..
3. **PREFERRED AND EASIEST METHOD** Write a letter to your broker with instruction to make the gift by transferring the shares from your account to the Merrill Lynch Acct. #653-04A50 for the Educational Foundation of Alpha Gamma Rho. Your broker can make the transfer using these four items:

DTC #5198
Merrill Lynch
Acct. #653-04A50
Educational Foundation of Alpha Gamma Rho

No documents are needed. Upon confirmation of the transfer, the Foundation will send an acknowledgment and thank you letter to the donor.

Please note: DO NOT sell the stock or you'll likely lose some tax advantages. The stock needs to be transferred to the Foundation who will make the sale.