



GIFT TRANSFER INSTRUCTIONS (As of October 2017)

Boy Scouts of America National Foundation | Federal Tax ID: 75-2675978

ELECTRONIC TRANSFERS OF STOCK (BROKER-TO-BROKER)

For direct, electronic transfers of stock, please have the broker transfer stock to:

Merrill Lynch
Boy Scouts of America
DTC Clearing #8862
Account #425-02802

For Mutual Funds, the BIN number is **5300000296**

When using electronic transfers, *please* fax or email the information/form below. Due to privacy laws, it is **NOT** always apparent who is donating the stock to us. The information below will make sure it is properly credited. **Fax:** BSA Cash Management, **972.580.2108**, or email **tim.pierce@scouting.org**.

<u>Stock Name, Security Symbol</u>	<u>Number of Shares</u>	<u>Transfer Date</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

Total Value of Gift (approx.): \$ _____

Donor Name: _____

Donor Address: _____

City/State/Zip: _____

Donor Phone/Email: _____

If there is a specific designation or purpose of the donation, please indicate below:

Donor Signature

Date Signed



ELECTRONIC TRANSFER OF CASH/SALES PROCEEDS FROM STOCK

If you are electronically transferring cash or sales proceeds from stock your broker is selling, please direct them to:

JP Morgan Chase – New York, NY
Credit: Boy Scouts of America
ABA # 02100021
Acct # 118687968

When using electronic transfers, please fax or email a notice to Cash Management (email below), describing the transfer amount, the purpose for the funds, and the expected transfer date.

Fax: BSA Cash Management, **972.580.2108**, or **email:** tim.pierce@scouting.org.

MAILING OF STOCK CERTIFICATES AND/OR CHECKS

If mailing checks, money orders, and stock certificates, please send them to:

*Tim Pierce, Cash Management, S401
Boy Scouts of America National Foundation
1325 West Walnut Hill Lane
Irving, Texas 75015-2079*

For security purposes, if you are sending actual stock certificates, we suggest sending unsigned stock certificates **and** properly signed stock powers in separate envelopes. Please include in the mailing a description as to the use/purpose of the funds (e.g., “to establish my new Donor Advised Fund.”)

GIFT TRANSFERS TO FUND BSA GIFT ANNUITIES

There are different transfer instructions if you are making a gift to fund a gift annuity with the BSA Foundation. To receive these, please contact us at **972. 580. 2219**, or diane.smith@scouting.org.

TRANSFERS OF REAL ESTATE TO THE BSA FOUNDATION

Please request our packet of information covering real estate transfers to the BSA Foundation. This will include a basic questionnaire about the property, including environmental issues. To receive a copy, or if you have questions, contact us at **972. 580. 2219**, or diane.smith@scouting.org.

[FOR INFORMATION ABOUT CREDIT CARD GIFTS, PLEASE SEE PAGE 3.](#)



GIFTS USING CREDIT CARDS

Please complete the following information. The donor will need to sign and date the credit card authorization – when completed, please send via secure fax to Julia Alvarado-Simmons at 972-580-2108. Note that credit card gifts incur a 3% processing fee from the credit card company.

Donor Name: _____

Donor Address: _____

City/State/Zip: _____

Phone or Email: _____

This gift is intended for the following purpose or fund at the BSA Foundation:

Credit Card (check one): MasterCard VISA American Express Discover

Credit Card #: _____ Expiration Date: _____

Donor Signature: _____ Date: _____

Please discuss with your advisors this gift and all other types of gifts, methods, and options for gifts.