



GIFT TRANSFER INSTRUCTIONS (2017)

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

ELECTRONIC TRANSFER OF CASH/SALES PROCEEDS FROM STOCK

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

JP Morgan Chase – New York, NY
Credit: Boy Scouts of America
ABA # 021000021
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

Checks, money orders, and stock certificates should be sent to:

*Tim Pierce, Cash Management, 5401
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 ELECTRONIC TRANSFERS OF STOCK, MUTUAL FUNDS,
AND CREDIT CARD GIFTS, PLEASE SEE PAGES 2 AND 3.***



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
LPL Account #8ER-02015
DTC Clearing #5198

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**.

Stock Name, Security Symbol	Number of Shares	Transfer Date
_____	_____	_____
_____	_____	_____
_____	_____	_____

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

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



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: _____