



## GIFT TRANSFER INSTRUCTIONS

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:

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

For Mutual Funds the BIN number is 5300000296

If you are making a transfer from a **Schwab account**, you may choose to use:  
Schwab Account Name: Boy Scouts of America Schwab Acct. #7255 8792

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. The information below will make sure it is properly credited. **Fax:** BSA Cash Management, **972.580.2108**, or email [tim.pierce@scouting.org](mailto: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*

*Continue for different types of gift transfers*



### MAILING OF STOCK CERTIFICATES AND/OR CHECKS

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

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

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.”)

### ELECTRONIC TRANSFER OF CASH/SALES PROCEEDS FROM STOCK

Electronic transfers of cash or sales proceeds from stock sold by your broker, should go 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](mailto:tim.pierce@scouting.org).

### GIFT TRANSFERS TO FUND BSA GIFT ANNUITIES

If you are making a gift to fund a **gift annuity** with the Boy Scouts of America, there are different transfer instructions. For these gifts, please call **214.384.3247**, or email [Angela.Sanchez@scouting.org](mailto:Angela.Sanchez@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 [Patty.Bowman@scouting.org](mailto:Patty.Bowman@scouting.org).

**Please discuss all gifts, gift methods, and options with your advisors.  
Please see page 3 if you are using a credit card for your gift.**



## 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 Patty Bowman: FAX 972-580-7870. You may also phone her with the information: **972-580-2219**. Note that credit card gifts will 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: \_\_\_\_\_