

# The Ohio CPA Foundation Appreciated Securities Gift Form

Print Name: \_\_\_\_\_

I. It is my intention to gift appreciated securities with an approximate value of  
\$\_\_\_\_\_ to:

\_\_\_\_\_ The Ohio CPA Foundation Annual Fund (unrestricted)

\_\_\_\_\_ The Ohio CPA Foundation for \_\_\_\_\_

II. Date of Birth: \_\_\_\_\_

III. I will instruct my current broker to transfer the \_\_\_\_\_ shares of  
\_\_\_\_\_ to an account at the following address:

**[Please note: If transferring mutual funds, please contact us before initiating the transfer.]**

Charles Schwab & Co, Inc.  
DTC Number 0164  
Code 40  
Account number #3362-8945

The Ohio CPA Foundation c/o The Ohio Society of CPAs  
Attn: Lori Brown  
4249 Easton Way, Suite 150  
Columbus, OH 43219  
Tax I.D. #31-6052485

IV. If needed, I give permission for The Ohio CPA Foundation to contact my stock broker:

Stock Broker \_\_\_\_\_

Phone \_\_\_\_\_

The Ohio CPA Foundation is grateful for your thoughtful gift and will send a letter of acknowledgment.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Address: \_\_\_\_\_

**The recommended steps to transfer Appreciated Securities to The Ohio CPA Foundation:**

1. Note that the form has four areas to complete:
  - I. Approximate value (and restrictions if applicable).
  - II. List personal information to ensure that your gift can be identified.
  - III. It is important to note the number and description of the securities. The account information provided is needed by your broker to make the transaction.
  - IV. Please provide the name and telephone number of your stock broker in case The Ohio CPA Foundation needs to contact him/her.
  
2. Once you have completed the form, please send copies to:
  - a. The Ohio CPA Foundation  
Attention: Lori Brown  
lsbrown@ohiocpa.com
  - b. To your stock broker to ask for the transfer to be made
  
- Please note:** If transferring mutual funds, please contact the Foundation before the transfer is initiated, so we can provide additional instructions.
  
3. The Ohio CPA Foundation will contact you directly to verify that the transaction has taken place. If you do not receive a call within 48 hours after the transfer, please contact Lori Brown at 614.764.2727 ext. 2221 or lsbrown@ohiocpa.com.
  
4. The Ohio CPA Foundation will acknowledge your gift of securities by mail. Thank you!

**If you have questions or need additional information, please contact:**

**Lori Brown, Director of Partnership Development**  
**lsbrown@ohiocpa.com | 614.764.2727 x2221**