

Aloha Council, BSA

Instructions for Stock Donations:

- 1) **Physical Certificate** (*person has the actual stock certificate in their hand*)
 - Complete Stock Power (RJ form #1046) – signed by the registered holder(s) for each stock being submitted.
 - Medallion Guaranteed or have a notarized Authority to Deposit (RJ form#1087) signed by the registered holder(s).
 - Forward both forms with the actual stock certificate to Raymond James - Honolulu Office.

- 2) **Stock in Donor's account** (*stock is in the donor's brokerage firm account*)

Re-Register to Aloha Council Boy Scouts of America name, then ACAT to Raymond James account – DTC #0725 FBO Aloha Council Boy Scouts of America / Account #775VJ005)

- 3) **If donor has no brokerage firm w/physical certificate:**

Donor would need to open an account and deposit stock certificate into his/her account (sign stock power). Now, donor (client), need to sign a letter of authorization (LOA) to transfer that stock into Aloha Council Boy Scouts of America.

STOCK TRANSACTION INFORMATION

A. Donor's Personal Information:

Donor Name: _____

Telephone: Work: _____ Home: _____

E-mail: _____

If a new donor, please verify address information:

Company: _____

Street: _____

City/State/Zip: _____

B. Donor's Stock Broker's Information:

Stock Broker's Name/Firm: _____

Telephone Number: _____

C. Stock Information:

Number of Shares: _____ Name of Stock: _____

Stock Is to Be Used For: Year _____ Friends of Scouting Value: \$ _____

(Indicate Dollar Amount) Year _____ Capital Value: \$ _____

Year _____ Endowment Value: \$ _____

Year _____ Other: _____ Value: \$ _____

Date of Transfer into Account: _____ Total Value: \$ _____

Donor Signature: _____

Please return form to michele.kamau@scouting.org.