



### Instructions for Stock Gifts

College Advising Corps welcomes gifts of stock, securities, and other appreciated assets. To initiate a transfer of stock or securities held by a brokerage firm or commercial bank, please notify your broker or bank that you intend to transfer securities to College Advising Corps. This can often be done online. Your broker or bank will need the information below to complete this transaction.

- Brokerage Name: TD Ameritrade
- For the Benefit of: National College Advising Corps Inc.
- College Advising Corps Account #: 252361765
- Broker DTC #: 0188
- Federal Tax ID (EIN #):46-1192687

### Important Instructions for Donors

Please notify College Advising Corps about your gift at the following e-mail address:  
[finance@advisingcorps.org](mailto:finance@advisingcorps.org)

Including the information below will help us to track your gift and thank you as soon as possible.

- Your name and contact information
- The number and types of shares

Note: if your stock is in certificate form (rather than in an account at a financial firm), you will need to go to a TD Ameritrade office to deposit the shares into our account. It is important to do this in person to avoid sending endorsed stock certificates through the mail.

For further information, please call TD Ameritrade's toll-free number: 800-669-3900.

### Information about Valuation

**Stock Valuation for Donors:** The delivery method of your stock gift determines the deductible value for IRS tax purposes. Please consult with your tax advisor. We are happy to confirm your stock donation, reflecting the name of the security and number of shares. Your tax advisor will help you calculate the deductible value.

**Stock Valuation for College Advising Corps :** CAC determines the value of your stock gift for funding and recognition purposes according to IRS and accounting guidelines.