

# GENERAL GIFTING INSTRUCTIONS FOR SECURITIES

## BOOKSMILES

1879 Old Cuthbert Road, Unit 33, Cherry Hill, NJ 08034

Phone: 973-396-0500 Email: [Larry@booksmiles.org](mailto:Larry@booksmiles.org)

A gift of securities is considered to be completed on the “date of delivery” (when a stock is in a BookSmiles account, or on the postmark date, if mailed), which determines the value of the gift.

### 1. Securities

Please notify BookSmiles before transferring/ mailing stock certificates by calling Larry Abrams at 973-396-0500.

#### A. **Securities Held in a Broker or Bank Account — See Security Transfer Form**

Complete the “General Security Transfer Form” and mail it to your broker/bank.

Email a copy to Larry Abrams at [larry@booksmiles.org](mailto:larry@booksmiles.org).

#### B. **Security Certificate Held by Donor**

A letter should accompany the stock certificate(s) with instructions on the use of the gift. DO NOT endorse the certificate(s). Instead, endorse the Stock Power(s) and mail it/them in a separate envelope. *Please note that a Medallion Signature Guarantee is required on the Stock Power.* This is a stamp provided by your financial institution when your signature is verified. Both mailings should be sent to:

BookSmiles

Attn: Larry Abrams

1879 Old Cuthbert Road

Unit 33

Cherry Hill, NJ 08034

#### C. **Mutual Funds**

Please contact Larry Abrams at 973-396-0500 or [larry@booksmiles.org](mailto:larry@booksmiles.org) to coordinate delivery.

# BOOKSMILES GENERAL SECURITY TRANSFER FORM

1879 Old Cuthbert Road, Unit 33, Cherry Hill, NJ 08034

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## DONOR INSTRUCTIONS TO BROKER/BANK

**Important: To insure proper credit for your gift, please mail a copy of the instructions given to your broker/bank to: BookSmiles, Planned Giving, 1879 Old Cuthbert Road, Unit 33, Cherry Hill, NJ 08034**

Name of Broker: \_\_\_\_\_

Firm Name: \_\_\_\_\_

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

Street

City

State

Zip

Broker Phone Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_

Name of Donor(s): \_\_\_\_\_

Donor Phone Number: \_\_\_\_\_ Donor Fax Number: \_\_\_\_\_

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

Street

City

State

Zip

**I hereby authorize you to transfer the following securities from my account:**

Donor Brokerage Account Number: \_\_\_\_\_

Number of Shares & Security Name: \_\_\_\_\_ Date Acquired (if known): \_\_\_\_\_

\_\_\_\_\_

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*The designation or purpose of this gift is as follows:* \_\_\_\_\_

\_\_\_\_\_  
*(Signature of Donor)*

\_\_\_\_\_  
*(Date)*

\_\_\_\_\_  
*(Signature of Joint Donor if applicable)*

\_\_\_\_\_  
*(Date)*

