

GENERAL GIFTING INSTRUCTIONS FOR SECURITIES

BOOKSMILES

7300 N. Crescent Blvd., Unit 10, Pennsauken, NJ 08110

Phone: 973-396-0500 Email: 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.

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

7300 N. Crescent Blvd.

Unit 10

Pennsauken, NJ 08110

C. Mutual Funds

Please contact Larry Abrams at 973-396-0500 or larry@booksmiles.org to coordinate delivery.

BOOKSMILES GENERAL SECURITY TRANSFER FORM

7300 N. Crescent Blvd., Unit 10, Pennsauken, NJ 08110

Phone: 973-396-0500 Email: Larry@booksmiles.org

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, 7300 N. Crescent Blvd., Unit 10, Pennsauken, NJ 08110

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): _____

The designation or purpose of this gift is as follows: _____

(Signature of Donor)

(Date)

(Signature of Joint Donor if applicable)

(Date)