

# 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.

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### 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](mailto:michele.kamau@scouting.org).