



Appreciated Securities Transfer Form

Print Name: _____ Phone: _____ Email: _____

- I. It is my intention to gift appreciated securities with an approximate value of \$ _____ for the following purpose(s):
- _____ Unrestricted
 - _____ Current support restricted to: _____
 - _____ Restricted support (an endowment) to the following program area:
 - _____ Named Scholarship or Leadership Award (min. \$25,000)
 - _____ Chapter Endowment/ Scholarship Fund (for _____ Chapter)
 - _____ Other: _____

II. Chapter/School: _____ Year of Initiation: _____

- III. _____ I will instruct / have instructed my broker to transfer _____ shares of _____ stock to an account at the following address:

Triangle Education Foundation
c/o UBS Financial Services
2301 W. Big Beaver Road, Ste. 800
Troy, MI 48084
Attention: Bradford S Vannelli
(866) 468-6547 or bradford.vannelli@ubs.com
Account #: DE 42620 DTC #: 0221

IV. Please contact my stock broker if necessary to confirm the transaction.

Broker Name: _____ Phone: _____ E-Mail: _____

Address: _____

Signature

Date

Appreciated Securities Transfer Procedures

1. Note that the form has four areas to complete:
 - I. Approximate Value and Restrictions (if applicable).
 - II. Personal Information (to ensure that your gift can be identified).
 - III. Number and Description of the Securities. (The account information provided is needed by your broker to complete the transaction.)
 - IV. Contact Information for your Stock Broker.

2. Once you have completed the form, please email, fax or mail copies to:
 - a. Triangle Education Foundation
Scott Bova, CFRE, President
317/705-9803 (direct)
317/837-9642 (fax number)
sbova@triangle.org
 - b. Your stock broker to confirm the transfer

3. The Triangle Education Foundation will call or email you directly to verify that the transaction has taken place. If you do not receive a call within 48 hours after the transfer, please contact Scott Bova at 317/705-9803 or at sbova@triangle.org.

4. The Triangle Education Foundation is most grateful for your thoughtful gift and will send a letter of acknowledgment.

Triangle Education Foundation Contact Information
Attn: Scott Bova
120 S. Center Street
Plainfield, IN 46161
Federal Tax Identification # 23-7063427

For further information, contact the Triangle Education Foundation
at www.triangleef.org, sbova@triangle.org or 317/705-9803.