



Scouting America ORANGE COUNTY COUNCIL

How to Make a Gift of Appreciated Stock

Thank you for considering a gift of appreciated stock to Scouting America Orange County Council. Please follow the steps below to complete your stock donation.

1. Contact Your Financial Advisor or Brokerage Firm

Tell your broker, financial advisor, or investment institution that you would like to make a charitable gift of appreciated stock to Scouting America Orange County Council. Please instruct your financial institution to process the transfer as a **DTC Free Delivery**.

For the securities transfer, use our legal account name: **Boy Scouts of America, Orange County**.

2. DTC Free Delivery Instructions

Transfer Method	DTC Free Delivery
Legal Account Name	Boy Scouts of America, Orange County
Brokerage Firm	Merrill Lynch
Broker	Linda Rusmisl
DTC Number	8862
Account Number	207-04481

Council Address: Scouting America Orange County Council, 2953 Pullman Street, Santa Ana, CA 92705

3. Provide the Securities Information

Your broker will typically need the name of the stock or security, ticker symbol, number of shares being donated, and the receiving DTC, account number, and account name shown above. Please instruct your financial institution to make a **DTC Free Delivery of the shares directly to the Boy Scouts of America, Orange County Merrill Lynch account**.

4. Notify Scouting America Orange County Council

Please notify us once your transfer has been initiated. Stock transfers may not include enough information for us to identify the donor. Send the following information so we can properly identify, acknowledge, and designate your gift:

Donor Name:	_____	Stock/Security Name:	_____
Ticker Symbol:	_____	Number of Shares:	_____
Approximate Transfer Date:	_____	Gift Designation/Campaign:	_____

Send notification to: Will Sandoval | Will.Sandoval@Scouting.org | (714) 546-4990 ext. 112

5. Gift Acknowledgment

Once the securities have been received and identified, Scouting America Orange County Council will provide a written charitable gift acknowledgment. The acknowledgment will identify the securities and number of shares received but will not assign a tax-deductible value. Donors should consult their tax or financial advisor regarding valuation and deductibility.

Questions? Contact Will Sandoval at Will.Sandoval@Scouting.org or (714) 546-4990 ext. 112.