



GIFT OF STOCK

Before donating stock, please inform the Office of Development by completing and returning this Notice of Intent to Transfer Stock form to Shawn Neil (contact information above).

NOTICE OF INTENT TO TRANSFER STOCK
Donor Information
Name(s) (Please Print):
Address:
Telephone: ( ) E-mail:
Gift Designation/Purpose
NAE Independent Fund President's Initiatives Fund Frontiers of Engineering EngineerGirl
Other:
Special Instructions/Requests:
Gift Information
Name of Security: Number of Shares:
Transferring Broker Information
Broker/Contact Person: Telephone: ( )

Once you send us the form, please follow these directions to transfer stock.

Electronic Transfer of Stock (easiest and safest method)

Please have your broker contact Merrill Lynch at 1-866-204-0150 and inform them of your wish to transfer stock to the National Academy of Engineering Fund.

Table with 3 columns: Account #: 5F7-62207, DTC #: 8862, Tax ID #: 23-7284092

Mailing Stock Certificate(s):

Please mail your stock certificate(s) directly to the Office of Development - do not sign the certificate(s). In a separate envelope, please mail us a signed and dated stock power form (available from your attorney or stockbroker) for each certificate. If two names appear on the certificates, the stock power must contain both signatures. Mailing the unsigned stock certificate(s) and the signed stock power form(s) separately helps to prevent theft. We recommend using certified mail/return receipt requested, and retain the date-stamped receipt for your tax records.

\*\*Your stock is valued as the average of the high and low prices on the date of transfer - this is the date the stock was electronically transferred to the National Academy of Engineering or the date stamped on the U.S. Postal Service certified mail receipt.\*\*

1 Send a note with your certificates to provide additional information or to explain extenuating circumstances - see sample below.

TRANSFERRING STOCK TO THE NATIONAL ACADEMY OF ENGINEERING FUND

SAMPLE LETTER OF INSTRUCTION TO BROKER

<Donor Name(s)>  
<Address>  
<Telephone Number>

<date>

<name of broker>  
<address>

RE: Letter of Instruction to transfer securities

Dear \_\_\_\_\_:

I wish to irrevocably contribute <insert number of shares or dollar amount> of <insert stock name> common stock to the National Academy of Engineering Fund (NAEF) to benefit the NAE Independent Fund at the National Academy of Engineering (NAE).

Please transfer these shares from my Account Number: #\_\_\_\_\_ to the NAEF in Washington, DC, (a not for profit corporation, Tax ID #: 23-7284092) on or before <insert date>.

Please transfer the shares to the Institute for NAEF's brokerage account with Merrill Edge as follows:

Merrill Edge  
Account Name: National Academy of Engineering Fund  
DTC #8862  
Account # 5F7-62207  
Telephone #:1-800-926-1111

If there are any questions about this transfer of stock, please call <insert your name and phone number>. Thank you for your prompt attention to this request.

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Signature of Donor(s)

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Name of Donor(s) (please print)

Date

cc: National Academy of Engineering  
Attn: Shawn Neil, Director of Advancement Services  
500 Fifth Street, NW, NAS 034  
Washington, DC 20001  
[SNeil@nae.edu](mailto:SNeil@nae.edu) or 202.334.3823