

HOW TO MAKE A GIFT OF STOCK TO THE NATIONAL ACADEMIES

In order to donate stock to the National Academies, you **MUST FIRST** complete and send the attached “Notice of Intent to Transfer Stock (NITS)” form to the Office of Development at the National Academies (address and fax number are listed on the form).

After you have sent us the form, via mail or fax, please follow the directions below for the type of stock transfer you would like to make.

Electronic Transfer of Stock Certificates:

For the National Academy of Sciences (NAS), the Institute of Medicine (IOM) or the National Research Council (NRC), please have your broker contact Bear Stearns (contact information is on the NITS form) and inform them of your wish to transfer stock to the National Academies.

For the National Academy of Engineering (NAE), please have your broker contact Bank of America Investments at the number listed on the next page, and inform them of your wish to transfer stock to the National Academy of Engineering Fund.

Mailing Stock Certificates:

Please mail the stock certificates directly to Bear Stearns at the address listed on the NITS form – do not sign the certificates. In a separate envelope, please mail a signed and dated stock power, which is available from your attorney or stockbroker. Mailing the stock certificates and stock power separately helps to prevent theft. We suggest using certified mail/return receipt requested, and retain the date-stamped receipt for your tax records.

Please note that the value of your gift is the average of the high and low prices that the stock traded on the date of transfer – this is the date the stock was electronically transferred to the National Academies or the date stamped on the U.S. postal service certified mail receipt. (If you use a private carrier, such as Federal Express, IRS rules recognize the gift date as the date the certificates are delivered, not when the certificates are sent.)

If you would like further information about making a gift of stock, please call us at (202) 334-2431 or email your inquiry to giving@nationalacademies.org.

FAX

PRIORITY ATTENTION REQUIRED
CONFIDENTIAL INFORMATION TRANSMITTED

To: Office of Development at the National Academies From:

Fax: (202) 334-2229 Date:

Phone: (202) 334-2431 Pages:

NOTICE OF INTENT TO TRANSFER STOCK TO THE NATIONAL ACADEMIES

Donor Information

Name (Please Print): _____

Address: _____

City: _____ State: _____ Zip Code: _____

Telephone: (____) _____

**Does the Donor wish to remain anonymous? No Yes

Gift Information

Name of Security: _____ Number of Shares: _____

Gift Designation/Purpose

Please select one.

- NAS Unrestricted Pledge Payment
 NAE Unrestricted Other (Staff member will contact you)
 IOM Unrestricted _____

Transferring Broker Information

Broker's Name: _____ Telephone: _____

Contact Details:

For the NAS/IOM/NRC:
Mary Carol McDonald
Bear Stearns and Companies, Inc.
3424 Peachtree Road NE, Suite 1700
Atlanta, GA 30326-9983
Phone: (800) 235-3162 or (404) 842-4400
Fax: (404) 995-4909
Account #: 05048145; DTC #: 352

Office of Development, NAS-335
The National Academies
500 Fifth Street, NW
Washington, DC 20001
Phone: (202) 334-2431
Fax: (202) 334-2229

For the NAE:
Bank of America Investments
Phone: (800) 926-1111
Account #: WD4-003212; DTC #: 0226

The National Academies Tax IDs:
#53 0196932 – NAS/IOM/NRC
#23 7284092 – NAE