



GIFT OF STOCK

For stock held in brokerage accounts, your broker can assist you in making a gift of stock via a direct transfer to the Terry Foundation. This may be more tax advantageous than selling the stocks and donating the net proceeds.

Potential Benefits:

- You allow the Terry Scholars Fund to receive the full pretax value of those appreciated assets.
- You may avoid long-term capital gains taxes you might otherwise owe.
- You may be able to deduct the full value of the stock on your tax return as a charitable gift.
- You may also save on brokerage fees when you transfer ownership rather than selling the stock. *source: <https://www.merrilledge.com/>*

Please transfer securities donated to the Terry Scholars Fund (tax ID# 88-2349834) to our account at Merrill Lynch using the following instructions:

Brokerage House: Bank of America Merrill Lynch

Account Name: The Terry Scholars Fund

Account Number: 83V-04150 DTC Number: 8862

Merrill Lynch Contact: Will Leven, 713-632-8395

Please notify the Terry Foundation of each transfer to make certain that gifts are properly acknowledged.

ABOUT US

The mission of the Terry Scholars Fund is to support the success of the Terry Foundation's mission: to develop future leaders of Texas through access to education. The purpose of the Terry Scholars Fund is to provide an effective way for donors to support the Terry Scholarship Program. **100% of every donation will go directly to Terry Scholarships.**

CONTACT

K.K. Eschbach
Chief Investment Officer
keschbach@terryfoundation.org

TSF Phone: 713-552-0814
TSF Email: donations@terryscholars.org



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Thank you for considering the Terry Scholars Fund for your charitable gift. Please complete the form below to notify the Terry Foundation of your gift and to help ensure it is processed and acknowledged accurately.

Mail the completed form to
The Terry Scholars Fund
3336 Richmond Ave., Suite 450
Houston, TX 77098

OR

Email the completed form to
donations@terryscholars.org

Donor and Securities Information:

_____/_____/_____
Name & Type of Securities (e.g.: DELL common stock) Security Symbol No. of Shares Transfer Date

Donor Name Individual Corporation Foundation
Donor Type

Donor Street Address

Donor City, State and Zip

Donor Phone Number or Email (for questions that may arise in the donation process)

Broker Contact Name

Broker Contact Phone Number

Broker Company

Broker Company City & State

Broker Contact Name

Broker Contact Phone Number

Donor Signature

Date

Donor Signature

Date

Please Note- If this is not an individual account, all account owners must sign this form.