

Support Our Mission

TRANSFER OF STOCK

Thank you for your interest in supporting The American College of Financial Services with a gift of stock! To transfer your stock to The College via Depository Trust Company, see the instructions below.



STEP 1:

Send a signed letter to your broker including the following information:

- ✓ Your name
- ✓ Today's date
- ✓ Your address and phone number
- ✓ Purpose of the gift
- ✓ Your signature

Please include: "I authorize [NAME OF BROKER AND BROKERAGE HOUSE] to transfer [NUMBER OF SHARES] shares of [NAME OF STOCK] from my account [ACCOUNT NUMBER] to The American College of Financial Services, 630 Allendale Road, Suite 400, King of Prussia, PA, 19406."

STEP 2:

Send a copy of the letter to:

Advancement Office
The American College of Financial Services
630 Allendale Road, Suite 400
King of Prussia, PA, 19406

STEP 3:

Provide your broker with the following transfer information:

- ✓ **Account Holder:** Charles Schwab
- ✓ **Account Name:** THE AMERICAN COLLEGE PROCEEDS FUND – LONG TERM
- ✓ **Account Number:** 1405-9621
- ✓ **DTC Number:** 0164
- ✓ **Code:** 40
- ✓ **Telephone:** (602) 355-9003

STEP 4:

Please notify The College:

Notify Nicole Harding, Assistant Vice President of Advancement Services in The College's Department of Advancement and Alumni Relations, once the stock transfer is complete by calling 610-526-1427 or by emailing Nicole.Harding@TheAmericanCollege.edu.

Notify The College of a Stock Transfer