

## **INSTRUCTIONS FOR GIVING SECURITIES TO THE GREATER TAMPA BAY AREA COUNCIL, INC., BOY SCOUTS OF AMERICA**

If you have questions concerning transfer of securities, please contact:

Mike Butler, CEO, or Ward Bramlett, Director of Finance  
Greater Tampa Bay Area Council, Boy Scouts of America  
13228 N. Central Ave  
Tampa, FL 33612  
Tel: (813) 872-2691 / Fax: (813) 875-5890

### **TRANSFERRING SECURITIES**

If you decide to give securities, you may ask your bank or broker to handle the transaction for you. The easiest method of giving securities is by electronic transfer between financial institutions. To do this, contact our Advisor at Truist Wealth.

#### **Advisor Information:**

Truist Wealth  
303 Peachtree Center Ave  
Atlanta, Georgia 30303  
Tel: (888) 516-5247 / Fax: (404)-813-7201

### **DTC INSTRUCTIONS TO NATIONAL FINANCIAL SERVICES**

#### **DTC ELIGIBLE SECURITIES**

DTC CLEARING NUMBER 0226  
FBO: Greater Tampa Bay Area Council, Inc., Boy Scouts of America  
A/C Number: WA7137386

#### **Transferring by physical mail:**

- Make a photocopy of the stock certificate(s) and the Securities Receipt. Attach the original Stock Receipt to the original certificate(s).
- Provide the client with the photocopy of the Securities Receipt.
- Mail the original stock certificate(s), with the original Securities Receipt to Operations via Overnight mail

Truist Investment Services, Inc., Truist Business Center 1  
Attn: Transfers, 2nd Floor  
11011 West Broad Street  
Glen Allen, VA 23060.

To complete this transfer, your financial institution will more than likely need a signed Letter of Instruction completed by all beneficial owners of the account. For your convenience, the Greater Tampa Bay Area Council has created a pre-formatted and easy-to-complete Letter of Instruction that will work for most institutions. Please consult with your Advisor or financial institution to confirm your specific requirements.

### **VALUATION**

For the purpose of determining any tax deduction benefit, the value of a gift is its fair market value (the mean between the high and the low quotations) on the gift date. The gift date is the date that the securities pass unconditionally from the donor's control to Greater Tampa Bay Area Council, BSA.

- If the securities are transferred electronically to the Greater Tampa Bay Area Council account at TRUIST WEALTH, the gift date is the date the securities are received in the account.
- If the securities are mailed, the gift date is the date of the postmark.

- If the securities are delivered in person, the gift date is the date on which the Greater Tampa Bay Area Council, BSA takes possession of the securities.

**ACKNOWLEDGMENT**

You will receive a letter of acknowledgment on behalf of Greater Tampa Bay Area Council, BSA that will describe the securities being given, the purpose for which they were given, and the valuation credited by the Greater Tampa Bay Area Council.

**DISCLAIMER**

Any information supplied above is for information purposes only. Greater Tampa Bay Area Council, and its employees, are neither financial advisors nor tax professionals. We encourage you to consult with your own professional tax advisor for further information and consideration of your individual circumstance.

**Pre-formatted Letter of Instruction is included on the next page.**

LETTER OF INSTRUCTION TO TRANSFER STOCK TO  
Greater Tampa Bay Area Council, Inc., Boy Scouts of America  
13228 N. Central Ave., Tampa, FL 33612  
(813) 872-2691

Date: \_\_\_\_\_

Financial Institution: \_\_\_\_\_

Attn: \_\_\_\_\_

Re: Letter of Instruction to Transfer Securities and/or Cash

To Whom It May Concern:

Please use this Letter of Instruction as my formal request to transfer the following securities and/or cash to Greater Tampa Bay Area Council, BSA as a pledge payment towards \_\_\_\_\_; or an outright gift towards \_\_\_\_\_:

Dollar amount of cash to be transferred: \$ \_\_\_\_\_

Securities to transfer:

Number of Shares	Security Name/Description	Symbol/CUSIP

Please transfer these securities and/or cash from my Account #: \_\_\_\_\_ to the Greater Tampa Bay Area Council brokerage account with Truist Wealth as follows:

**DTC INSTRUCTIONS TO NATIONAL FINANCIAL SERVICES**

**DTC ELIGIBLE SECURITIES**

DTC CLEARING NUMBER 0226

FBO: GREATER TAMPA BAY AREA COUNCIL, INC., BOY SCOUTS OF AMERICA

A/C NUMBER: WA7137386

(by mail instructions included on page one of instructions)

If there are any questions about this transfer of stock, please contact me at \_\_\_\_\_.

Thank you for your prompt attention to this request.

Respectfully,

\_\_\_\_\_  
Signature                      Date

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Signature                      Date

\_\_\_\_\_  
Printed Name