

The Ohio CPA Foundation Appreciated Securities Gift Form

Print Name: _____

I. It is my intention to gift appreciated securities with an approximate value of
\$_____ to:

_____ The Ohio CPA Foundation Annual Fund (unrestricted)

_____ The Ohio CPA Foundation for _____

II. Date of Birth: _____

III. I will instruct my current broker to transfer the _____ shares of
_____ to an account at the following address:

[Please note: If transferring mutual funds, please contact us before initiating the transfer.]

Charles Schwab & Co, Inc.
DTC Number 0164
Code 40
Account number #3362-8945

The Ohio CPA Foundation c/o The Ohio Society of CPAs
Attn: Karen West
4249 Easton Way, Suite 150
Columbus, OH 43219
Tax I.D. #31-6052485

IV. If needed, I give permission for The Ohio CPA Foundation to contact my stock broker:

Stock Broker _____

Phone _____

The Ohio CPA Foundation is grateful for your thoughtful gift and will send a letter of acknowledgment.

Signature

Date

Address: _____

The recommended steps to transfer Appreciated Securities to The Ohio CPA Foundation:

1. Note that the form has four areas to complete:
 - I. Approximate value (and restrictions if applicable).
 - II. List personal information to ensure that your gift can be identified.
 - III. It is important to note the number and description of the securities. The account information provided is needed by your broker to make the transaction.
 - IV. Please provide the name and telephone number of your stock broker in case The Ohio CPA Foundation needs to contact him/her.

 2. Once you have completed the form, please send copies to:
 - a. The Ohio CPA Foundation
Attention: Karen West
614.764-5880 (fax) or kwest@ohiocpa.com
 - b. To your stock broker to ask for the transfer to be made
- Please note:** If transferring mutual funds, please contact the Foundation before the transfer is initiated, so we can provide additional instructions.
3. The Ohio CPA Foundation will contact you directly to verify that the transaction has taken place. If you do not receive a call within 48 hours after the transfer, please contact Karen West at 800.686.2727 ext. 2235 or kwest@ohiocpa.com.

 4. The Ohio CPA Foundation will acknowledge your gift of securities by mail.

If you have questions or need additional information, please contact:

Karen West, Executive Director
kwest@ohiocpa.com
(800) 686-2727 ext. 2235