



Kappa Sigma Delta-Rho Educational Foundation Appreciated Securities Transfer Protocol

The form has four areas to complete.

- I. Approximate Value of Securities
- II. Restriction/Designation
- III. Description of Transfer
- IV. Contact Info of Broker and Donor

NOTES

It is important to provide the quantity and description of the securities, so that your gift can be identified.

The account information provided is needed by your broker to make the transaction.

Once you have completed the form, please email copies to:

- a. Kappa Sigma Delta-Rho Educational Foundation
Attention: Tom Reid, '76, Treasurer
treid@certifiedksolutions.com
 - b. To your stock broker to ask for the transfer to be made.
3. The Foundation will call or email you directly to confirm the transfer. If you do not receive a call within 48 hours after the transfer, please contact Tom Reid, per above.
 4. The Foundation will acknowledge your gift of securities by letter, for tax purposes.



Kappa Sigma Delta-Rho Educational Foundation Appreciated Securities Gift Form

Print Name: _____

- I. It is my intention to gift appreciated securities with an approximate value of
\$_____ to the Kappa Sigma Delta-Rho Educational Foundation.:
- II. This gift is to be used for:
____ The Greatest Need (Unrestricted)
____ Educational Housing Grants
____ Scholarships for Undergraduate Brothers and Pledges
____ Grants for Leadership Development Programs (e.g. KΣ Grand Conclave)
- III. ____ I will instruct my current broker to transfer _____ shares of
_____ to an account at the following address:

DTC Code: 0164
Code: 40
Charles Schwab & Co., Inc.
Account #: 8502-7488
Account Name: Kappa Sigma Delta-Rho Education Foundation
Federal Tax I.D. #: 47-5304219

- IV. If needed, I give permission for the Educational Foundation to contact my stock broker:

Stock Broker _____

Phone _____

The Kappa Sigma Educational Foundation is grateful for your thoughtful gift and will send a letter of acknowledgment.

Signature

Date

Phone: _____

Email: _____