



## Instructions for Donations of Stock to the Brain Injury Association

### Step 1: Complete Transfer

- If the shares are held at a securities firm or other brokerage account, instruct your broker to transfer the shares to:

Brain Injury Association of America, Inc. – Gift Clearing Account

Account Number: 2503-7060

DTC Number: 0164 code 40

Instruct your broker to enter identifying information (i.e., your name and address, phone number, account number, broker information) into the "Text Comment" field of the DTC screen.

If your broker requires information about the recipient, please provide the following contact information:

Brain Injury Association of America

c/o Susan H. Connors, President

1608 Spring Hill Road, Suite 110

Vienna, VA 22182

703-761-0750

[development@biausa.org](mailto:development@biausa.org)

If you would like to transfer shares of mutual funds, please contact Stephanie Cohen, Development Manager at (703) 761-0750 x645 or via e-mail at [development@biausa.org](mailto:development@biausa.org) to make sure that the shares can be accepted.

- If certificates/shares are in your physical possession, you must send the certificates and a Letter of Authorization (see sample below).

Please note: The signature of the person(s) named on the certificate(s) must be on the back of the certificate(s). The Brain Injury Association's Charles Schwab account number (2503-7060) should be written on the face of the certificate(s).

The Brain Injury Association recommends these items be sent by a tracked mail system for security purposes (i.e. UPS, Federal Express, Registered Mail, etc.) to our broker at the following address:

Charles Schwab & Co., Inc.

IST East 6

1958 Summit Park Drive

Orlando, FL 32810

(800) 515-2157 toll-free

**Step 2: Notify the Brain Injury Association of your Gift**

Please provide the following information so that the Brain Injury Association of America can acknowledge your generosity and send a tax receipt to you:

Donor Name(s) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Telephone \_\_\_\_\_ E-mail \_\_\_\_\_

Type of Stock \_\_\_\_\_ Number of Shares \_\_\_\_\_

Approximate Transfer Date \_\_\_\_\_ Your Brokerage Firm \_\_\_\_\_

You may mail this form to the address below, fax the form to 703-761-0755, send an e-mail with the details to [development@biausa.org](mailto:development@biausa.org), or contact us by phone at 703-761-0750.

Brain Injury Association of America  
1608 Spring Hill Road, Suite 110  
Vienna, VA 22182

## Sample Letter of Authorization

[Current Date]

To Whom It May Concern:

I am making a donation to the Brain Injury Association Inc. Endowment Securities Fund of \_\_\_\_\_ shares of \_\_\_\_\_ stock. Please transfer these shares to DTC# 0164 code 40, Account# 2503-7060.

Please enter my name and address, phone number, account number and/or broker information into the "Text Comment" field of the DTC screen so that the Brain Injury Association of America can identify these shares and acknowledge my gift to the organization.

The contacts for the association and its broker are as follows:

Susan H. Connors, President  
Brain Injury Association of America  
1608 Spring Hill Road, Suite 110  
Vienna, VA 22182  
703-761-0750  
development@biausa.org

Charles Schwab & Co., Inc.  
IST East 6  
1958 Summit Park Drive  
Orlando, FL 32810  
(800) 515-2157 toll-free

Thank you for your attention to this matter. Please call me with any questions or problems.

Sincerely,

[Signature]

[Name of donor]

[Donor phone number]