

## Instructions for Donations of Stock to the Brain Injury Association (Effective 11/5/20)

### 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 the Brain Injury Association of America - Gift Clearing Account:

SEI Private Trust Company

DTC Participant Number: 2663

Account Number: 882325601

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, Inc.

C/O Rick Willis, President & CEO

3057 Nutley Street #805

Fairfax, VA 22031-1931

703-761-0750

development@biausa.org

- If certificates/shares are in your physical possession, you must send the certificates and a completed/signed Irrevocable Stock or Bond Power form (see instructions and blank below).

The Brain Injury Association of America 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:

TIAA, FSB

Attn: Lisa Butler

211 North Broadway, Suite 1000

St. Louis, MO 63102

FBO: 882325601 BIAA - Gift Clearing

- **Mutual Funds**

If you would like to transfer shares of mutual funds that are not DTC eligible, please contact BIAA's TIAA Trust Administrator, Lisa Butler, at (314) 244-5073 or toll-free at (888) 842-9001 ext. 45-5073 for assistance. Her e-mail address is [lisa.butler@tiaa.org](mailto:lisa.butler@tiaa.org). She will provide a mutual fund account number for delivery.

- **Cash Balances**

Please contact BIAA's TIAA Trust Administrator, Lisa Butler, prior to wiring funds or transferring funds via ACH.

She may be reached at (314) 244-5073 or toll-free at (888) 842-9001 ext. 45-5073 for assistance. Her e-mail address is [lisa.butler@tiaa.org](mailto:lisa.butler@tiaa.org).

(See next page)

Via Wire

Wells Fargo Bank, NA  
420 Montgomery St.  
San Francisco, CA 94104  
ABA #: 121000248  
A/C Name: SEI Private Trust ACF TIAA Client Dep  
1 Freedom Valley Dr., Oaks, PA 19456  
DDA #: 2020050840078  
Acct FFC: 882325601 BIAA – Gift Clearing Acct

By ACH

Wells Fargo Bank, NA  
San Francisco, CA  
ABA #: 026012881  
A/C Name: SEI Private Trust ACF TIAA Client Dep  
DDA #: 2020050840078  
FFC: 882325601 BIAA – Gift Clearing Acct

By Check

Payable To: Brain Injury Association of America  
C/O TIAA, FSB  
Attn: Lisa Butler  
211 North Broadway, Suite 1000  
St. Louis, MO 63102  
FBO: 882325601 BIAA – Gift Clearing

**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.

Mail to: Brain Injury Association of America, 3057 Nutley Street #805, Fairfax, VA 22031-1931

## Sample Letter of Authorization

[Current Date]

To Whom It May Concern:

I am making a donation to the Brain Injury Association of America, Inc. (BIAA) Gift Clearing Account of \_\_\_\_\_ shares of \_\_\_\_\_ stock. Please transfer these shares to DTC# 2663, Account# 882325601.

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:

Rick Willis, President & CEO  
Brain Injury Association of America, Inc.  
3057 Nutley Street #805  
Fairfax, VA 22031-1931  
703-761-0750  
[development@biausa.org](mailto:development@biausa.org)

Lisa Butler, Institutional Trust Administrator  
TIAA, FSB  
211 North Broadway, Suite 1000  
St. Louis, MO 63102  
(314) 244-5073  
Toll Free (888) 842-9001, Ext. 45-5073  
[lisa.butler@tiaa.org](mailto:lisa.butler@tiaa.org)

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

Sincerely,

[Signature]

[Name of donor]

[Donor phone number]

**Irrevocable Stock or Bond Power** *<Instructions>*

**For Value Received**, the undersigned does (do) hereby sell, assign and transfer to <Leave Blank>

**\*IF STOCK - COMPLETE THIS SECTION**

<# of Shares> shares of the <common, preferred, etc.> stock of <Company Name>

represented by Certificate(s) No(s). <Certificate Number on Physical Certificate>

inclusive, standing in the name(s): <Name(s) on physical certificate (how certificate is currently registered)>

**\*IF BONDS - COMPLETE THIS SECTION**

<Type: Muni, Corporate, etc.> bonds of <Company Name> in the principal amount of

\$ <Par Value> represented by Certificate(s) No(s). <Certificate Number on Physical Certificate>

inclusive, standing in the name(s): <Name(s) on physical certificate (how certificate is currently registered)>

The undersigned does (do) hereby irrevocably constitute and appoint **SEI Private Trust Company**

Attorney to transfer the said stock or bond(s), as the case may be on the books of said Company, with full power of substitution in the premises.

Dated \_\_\_\_\_

<Signature of Current Registered Owner>

<Signature of Current Registered Owner>

<Signature of Current Registered Owner>

## Irrevocable Stock or Bond Power

**For Value Received**, the undersigned does (do) hereby sell, assign and transfer to \_\_\_\_\_

### **\*IF STOCK - COMPLETE THIS SECTION**

\_\_\_\_\_ shares of the \_\_\_\_\_ stock of \_\_\_\_\_  
represented by Certificate(s) No(s). \_\_\_\_\_  
inclusive, standing in the name(s): \_\_\_\_\_  
\_\_\_\_\_.

### **\*IF BONDS - COMPLETE THIS SECTION**

\_\_\_\_\_ bonds of \_\_\_\_\_ in the principal amount of  
\$\_\_\_\_\_ represented by Certificate(s) No(s). \_\_\_\_\_  
inclusive, standing in the name(s): \_\_\_\_\_  
\_\_\_\_\_.

The undersigned does (do) hereby irrevocably constitute and appoint **SEI Private Trust Company**  
Attorney to transfer the said stock or bond(s), as the case may be on the books of said Company, with  
full power of substitution in the premises.

Dated \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_