AMERICAN COLLEGE OF PEDIATRICIANS

CHARLES SCHWAB STOCK GIFT INSTRUCTIONS

In order to insure that the donor is properly credited with the gift to American College of Pediatricians (ACPeds) in an expeditious manner the following steps must be completed entirely (or we may experience difficulty in completing the trade and assigning the gift in a timely manner).

1 The following is the information needed to electronically transfer stock into the American College of Pediatricians (ACPeds) Brokerage account.

- **Legal Name : American College of Pediatricians (ACPeds)**
- **Brokerage Account : Charles Schwab**
- **DTC# : 0164**
- **Schwab Acct. # : 60009906**
- **ACPeds Tax ID # : 47-0886878**

2 Instruct your broker to identify you, by name, as the donor WHEN the transfer is made. If your broker requires additional information, please contact:

- **Charles Schwab Toll Free Telephone: 1 (800) 435-4000**

3 To ensure that your gift is properly credited and acknowledged please notify in writing:

JON CASSADY
American College of Pediatricians (ACPeds)
5021 Vernon Ave South, #173
Edina, MN 55436
email: advancementdirector@acpeds.org
Telephone: (352) 376-1877 ext. 1006

4 The information that needs to be communicated to Jon Cassady at the American College of Pediatricians (ACPeds) (either written or via e-mail) is:

- **Number of Shares**
- **Type of Shares (Company)**
- **Date of Transfer**
- **Purpose (if any) of gift (i.e. school fund, building fund, etc.)**

Step 4 is critical to be able to match donors with the Charles Schwab transaction.

5 If you are already a Charles Schwab customer, simply call Schwab at 1-800-435-4000 to “request a transfer from your account to the American College of Pediatricians (ACPeds) Account” listed above (47-0886878).