



## Purdue Leadership and Educational Housing Fund

### Appreciated Securities Transfer Form

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Print Name: \_\_\_\_\_ Phone: \_\_\_\_ - \_\_\_\_ - \_\_\_\_\_

Email: \_\_\_\_\_

I. It is my intention to gift appreciated securities with an approximate value of \$\_\_\_\_\_ for the following purpose(s):

Current support restricted to: Purdue Leadership and Educational Housing Fund

II. Chapter/School: Purdue University Year of Initiation: \_\_\_\_\_

III. I will instruct / have instructed my broker to transfer \_\_\_\_\_ shares of \_\_\_\_\_ stock to an account at the following address:

Triangle Education Foundation – to the benefit of Purdue Leadership and Educational Housing Fund  
c/o Charles Schwab & Co., Inc.  
AS Document Control  
PO Box 982600  
El Paso, TX 79998-2600  
Contact: Bradford Vannelli

(313) 944-0183 or bvannelli@transcendcapital.com

Account #: 6606-1092 DTC #: 0164, Code 40

IV. Please contact my stockbroker if necessary to confirm the transaction.

Broker Name: \_\_\_\_\_ Phone: \_\_\_\_\_

E-Mail: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

*(over for instructions)*

## Appreciated Securities Transfer Procedures

1. Note that the form has four areas to complete:

I. Approximate Value and Restrictions (if applicable).

II. Personal Information (to ensure that your gift can be identified).

III. Number and Description of the Securities. (The account information provided is needed by your broker to complete the transaction.)

IV. Contact Information for your Stockbroker.

2. Once you have completed the form, please email, fax or mail copies to:

a. Triangle Education Foundation  
Scott Bova, CFRE, President  
(317) 705-9803 (direct)  
sbova@triangle.org

b. Your stockbroker to confirm the transfer

3. The Triangle Education Foundation will call or email 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 Scott Bova at (317) 705-9803 or at sbova@triangle.org.

4. The Triangle Education Foundation is most grateful for your thoughtful gift and will send a letter of acknowledgment.

Contact Information:

Triangle Education Foundation

Attn: Scott Bova

120 S. Center Street

Plainfield, IN 46161

Federal Tax Identification # 23-7063427

For further information, contact the Triangle Education Foundation at [www.triangleef.org](http://www.triangleef.org), [sbova@triangle.org](mailto:sbova@triangle.org) or (317) 705-9803.