



Instructions for Stock Gifts

College Advising Corps welcomes gifts of stock, securities, and other appreciated assets. To initiate a transfer of stock or securities held by a brokerage firm or commercial bank, please notify your broker or bank that you intend to transfer securities to College Advising Corps. This can often be done online. Your broker or bank will need the information below to complete this transaction.

- Brokerage Name: Charles Schwab
- For the Benefit of: National College Advising Corps
- National College Advising Corps Account #: 9191-9192
- Broker DTC #: 0164 code 40
- Federal Tax ID (EIN #):46-1192687

Important Instructions for Donors

Please notify College Advising Corps about your gift at the following e-mail address:
finance@advisingcorps.org

Including the information below will help us to track your gift and thank you as soon as possible.

- Your name and contact information
- The number and types of shares

For further information, please call Charles Schwab toll-free number: 800-435-4000.

Information about Valuation

Stock Valuation for Donors: The delivery method of your stock gift determines the deductible value for IRS tax purposes. Please consult with your tax advisor. We are happy to confirm your stock donation, reflecting the name of the security and number of shares. Your tax advisor will help you calculate the deductible value.

Stock Valuation for College Advising Corps : CAC determines the value of your stock gift for funding and recognition purposes according to IRS and accounting guidelines.