



GIFT OF STOCK

For stock held in brokerage accounts, your broker can assist you in making a gift of stock via a direct transfer to the Terry Foundation. This may be more tax advantageous than selling the stocks and donating the net proceeds.

Potential Benefits:

- You allow the Terry Foundation to receive the full pretax value of those appreciated assets.
- You may avoid long-term capital gains taxes you might otherwise owe.
- You may be able to deduct the full value of the stock on your tax return as a charitable gift.
- You may also save on brokerage fees when you transfer ownership rather than selling the stock.

source: <https://www.merrilledge.com/>

Please transfer securities donated to the Terry Foundation (tax ID# 31-1551093) to the Foundation's account at Merrill Lynch using the following instructions:

Brokerage House: Merrill Lynch

Account Name: Terry Foundation

Account Number: 83V-03608

DTC Number: 8862

Merrill Lynch Contact: Will Leven, 713-632-8395

Please notify the Terry Foundation of each transfer to make certain that gifts are properly acknowledged.

ABOUT US

The Terry Foundation's mission is to develop future leaders of Texas through access to education. Our vision is to create a community of educated leaders who utilize their talents to strengthen the state of Texas and impact the world.

CONTACT

Ed Cotham, Jr.
Chief Investment Officer

EMAIL: ecotham@terryfoundation.org
PHONE: 713-552-0002



GIFT OF STOCK

Thank you for considering the Terry Foundation for your charitable gift. Please complete the form below to notify the Terry Foundation of your gift and to help ensure it is processed and acknowledged accurately.

Mail the completed form to
The Terry Foundation
3104 Edloe Street, Suite 205
Houston, TX 77027

OR

Email the completed form to
Ed Cotham
at
ecotham@terryfoundation.org

Donor and Securities Information:

Name & Type of Securities (e.g.: DELL common stock) Security Symbol No. of Shares ____/____/____
Transfer Date

Donor Name Individual Corporation Foundation
Donor Type

Donor Street Address

Donor City, State and Zip

Donor Phone Number or Email (for questions that may arise in the donation process)

Broker Contact Name

Broker Contact Phone Number

Broker Company

Broker Company City & State

Broker Contact Name

Broker Contact Phone Number

Donor Signature Date

Donor Signature Date

Please Note- If this is not an individual account, all account owners must sign this form