# Stock Transfer Instructions

To make a charitable donation of stock to the Pi Kappa Alpha Foundation (Tax I.D. 62-6039877), please follow the instructions listed below.  You may contact Development Operations Officer Muffin Dixon Gray at 901-748-1948 x 1102 or mdixon@pikes.org if you have questions or need assistance. **It is important to notify the Foundation when a transfer has been initiated so that we can notify our brokerage firm and match the contribution with the respective donor.**

**Instruct your broker or brokerage firm to transfer to:**

DTC ELIGIBLE SECURITIES DELIVERY:
DTC Participant #8275
BNY Mellon Wealth Management
3290 Northside Parkway NW, Suite 950 Atlanta, GA 30327
Account Ref: 10593043910/Pi Kappa Alpha Fdn–Gift Account

For questions related to the gift transactions:

| **Dan Boling** | **Sam Thomas** |
|---|---|
| Daniel.Boling@bnymellon.com | Samuel.W.Thomas@bnymellon.com |
| Phone (678) 538-2009 | (678) 538 2008 |

**Donor Recognition Credit**
Once your gift of stock has been received, the Pi Kappa Alpha Foundation will provide documentation on the transaction for your records. You will receive **Donor Recognition Credit** equal to the amount of the IRS Determination Value (mean of the high and low stock trading value for the date the shares are received in the PIKE Foundation account with BNY Mellon Wealth Management, multiplied by the number of shares donated).

**Program Credit**
The amount credited to the designated Foundation program(s) will be determined by the final settlement amount after the shares are sold. While Foundation Policy dictates that stock be liquidated immediately, the amount credited to the designated program(s) may be higher or lower than the Donor Recognition Credit based on any fluctuations in the market on the date of the transaction. For more information on how this impacts your giving record and the fund's balance, please contact Development Operations Officer Muffin Dixon Gray.

**Information you may be asked to provide for the transfer of securities:**

Security Name:＿＿＿＿＿＿＿＿＿＿＿＿＿＿＿＿＿   Symbol: ＿＿＿＿＿＿＿＿＿＿＿＿＿＿

# of Shares: ＿＿＿＿＿＿＿＿＿＿＿＿＿＿＿＿

Broker Name and Phone Number: ＿＿＿＿＿＿＿＿＿＿＿＿＿＿＿＿＿＿＿＿＿＿＿＿＿＿＿