



PLAN USA STOCK GIFT INFORMATION

Thank you for requesting information on how to make a donation of securities to Plan USA.

Plan USA accepts gifts of stock either by electronic transfer or by receiving the stock certificate through the mail. The following instructions will explain how each of these methods work.

1. **Electronic Transfer:** When doing an electronic transfer of stock we ask that you please notify us prior to the transfer date so that we may inform our broker that a stock gift will soon arrive. **Please ask your broker to put your name on the information line of the transfer ticket. In addition, please make sure that the name of the organization is listed as Plan International USA Inc.** This will identify that the stock came from you and speeds up the processing time of your gift. Transfers can be made to our brokerage account by giving your broker the following information:

Merrill Lynch
DTC# 5198 – Merrill Lynch
1400 Merrill Lynch Drive
Pennington, NJ 08534
Tel: 877-653-4732

For further Plan USA credit: Acct # 5F3-68104
In the name of: Plan International USA Inc.
Our Tax ID#: 13-5661832

2. **By Mail:** In order to make a stock donation by mail the attached items are provided:
 - A) **Stock Power** - This form should be signed at the "x", signature guaranteed, and returned to us in a separate envelope from the stock certificate. If sending more than one certificate, you will need one stock power for each certificate - photocopies of the stock power are acceptable with an original signature and original signature guarantee on each.
 - B) **Letter of Authorization** - For us to sell the stock - please sign and return in the same envelope with the stock power(s). The letter of authorization also needs to have a signature guarantee (usually done by your bank). Photocopies of this letter can also be made for future use.

When you are ready to make a stock donation, simply send the signed stock power(s) and one Letter of Authorization in one envelope with instructions on how you wish the stock gift to be used and the unsigned stock certificate in a separate envelope. It is best to send the stock certificate by certified mail.

Another option when mailing stock gifts is having the stock certificate transferred into the name of Plan USA. When doing this, simply mail the certificate with instructions on how you wish the donation to be used by Plan USA. With the certificate in the name of Plan USA, the stock power and letter of authorization are unneeded.

The valuation of stock contributions is determined by using the mean value (average of high and low values) of the securities on the completion date of the gift. The completion date is either the day you hand deliver the certificate(s) and stock power(s) to our office, the postmark date of the certificate or the stock power whichever is later, the actual day the electronic transfer of stock is made to our broker, or the day the stock certificate is issued in the name of Plan USA.

If you have any questions please contact us at:
Plan USA, 155 Plan Way, Warwick, Rhode Island 02886-1099
1-800-556-7918