

# Stock Transfer Procedure

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Thank you for transferring stock to The Oaks Academy! We'll put it to immediate use for our students.

The Oaks Academy gift account is managed by the

Searles Akers Group of Merrill Lynch

510 East 96th Street Suite 500, Indianapolis, IN 46240

Email: n.jones@ml.com

Phone: 317.706.6903

Fax: 317.644.0431

1. Shares from a donor's brokerage account can be transferred to The Oaks Academy's account via the Depository Trust Clearing Corporation (DTC). You can transfer shares to "The Oaks Academy Gift Account", #655-04A14, via DTC #8862.
2. Stock certificates should be mailed unsigned to the Searles Akers Group (address above). In a separate envelope, mail a signed stock power and a signed letter of authorization asking that the certificate(s) be deposited into The Oaks Academy account (include the account number). A sample letter and the stock power are provided below for your convenience.

The Oaks Academy's tax identification number (EIN) is 35-2050595

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Sample Letter to Accompany Stock Certificates

Today's Date

Re: The Oaks Academy Gift Account

Account #655-04A14

Dear Searles Akers Group:

I/we are making a gift of name of stock certificate(s) here to The Oaks Academy. Enclosed is our signed stock power. Please deposit the share(s) into The Oaks Academy Gift Account.

Sincerely,

Your Name

Your Address

Your Phone Number

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## Irrevocable Stock Or Bond Power

For Value Received, the undersigned does (do) hereby sell, assign and transfer to

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(SOCIAL SECURITY OR TAXPAYER ID NUMBER)

IF STOCK, complete this portion	IF BOND, complete this portion
<p>_____ shares of the _____ stock of _____ represented by certificate(s) No(s). _____ inclusive, standing in the name of the undersigned on the books of said company.</p>	<p>_____ bonds of _____ in the principal amount of \$ _____ No(s). _____ inclusive, standing in the name of the undersigned on the books of said Company.</p>

The undersigned does (do) hereby irrevocably constitute and appoint

\_\_\_\_\_ attorney to transfer the said stock or bond(s), as the case may be, on the books of said Company, with full power of substitution in the premises.

**IMPORTANT:** The signature(s) to this power must correspond with the name(s) as written upon the face of the certificate(s) or bond(s) in every particular without alteration.

### FOR OFFICE USE ONLY

TITLE WHICH APPEARS ON CERTIFICATE	
TITLE WHICH APPEARS ON CERTIFICATE	

Account No. \_\_\_\_\_

Dated \_\_\_\_\_