



empowering young people to own their economic success

INSTRUCTIONS FOR GIVING STOCK AND MUTUAL FUNDS TO JUNIOR ACHIEVEMENT OF ARIZONA

Use the following Letter of Authorization (LOA) to contribute publicly traded securities such as stock and mutual funds and cash through your brokerage account. All contributions are irrevocable and are in most cases eligible for a tax deduction.*

The Letter of Authorization (LOA) on the following page is for your convenience. Please contact your financial institution to request their required procedures and forms and to provide them with the delivery instructions found below.

Please note that if you intend to provide a physical certificate, please deliver/mail the certificate to Junior Achievement of Arizona at the address below with a letter of release (donating to JAAZ). Please sign the back of the certificate (do not fill out anything else) or provide signed stock power (do not fill out anything else).

If you have questions about this process, please contact:
Rosemary Altuna, PF Practice Admin Manager
Wells Fargo Advisors, LLC
480-443-5765

*Individual circumstances vary. Please consult your tax advisor regarding your specific situations. Gifts from other tax-exempt organizations are not deductible.

Step 1: Initiate the transfer with your broker

To transfer stocks or mutual funds that are being held electronically, please use the Letter of Authorization on the following page and instructions below:

Deliver All DTC Eligible Securities to:
Wells Fargo Advisors, LLC
DTC# 0141
To the account of Junior Achievement of Arizona, Inc.
Account Number 3686-3142

Step 2: Notify JAAZ about your transfer

Please send a copy of your Letter of Authorization to:

Mail
Junior Achievement of Arizona
ATTN: Sherrie Cantrell, CFO
636 W Southern Ave
Tempe, AZ 85282

Email
sherriec@jaaz.org

Fax
480.219.0254
ATTN: Sherrie Cantrell, CFO

Step 3: Confirm your transfer

Transfers must be initiated by your financial advisor or broker. Please confirm with your broker or advisor that your gift has been transferred from your account to JAAZ's account. Once received, it usually takes 3-5 business days for your transfer to be liquidated, settled, and completely posted.



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LETTER OF AUTHORIZATION

Please accept this letter as my authorization to irrevocably transfer a portion of the positions from my account with your firm. I understand that I must initiate this transfer with my broker. My intention is to gift these stocks to Junior Achievement of Arizona, Inc. (JAAZ). If you have any questions, or if there is a problem with this transfer, please contact me immediately at the phone number below. This gift is being contributed by the following individuals/entities:

Contributor Name(s)

Address Phone Number Email Address

Name of Delivering Broker, Address, and Phone Number

Anticipated Date of Transfer My Account Number with your firm

Please Deliver All DTC Eligible Securities to:

Wells Fargo Advisors, LLC
DTC# 0141
To the account of Junior Achievement of Arizona, Inc.
Account Number 3686-3142

Please irrevocably transfer the following assets:

Cash Contribution: \$
Stocks, mutual funds, or other publicly traded assets listed below:

Table with 4 columns: Description of Assets/Name of Security, Symbol, Exact Number of Shares, Approximate \$ Value. Three rows for asset listing.

Please initiate the transfer based on the number of shares and not the dollar value since security values may fluctuate. Shares are to be transferred in kind and are not to be liquidated.

Total:

This is my written authorization to irrevocably transfer ownership of the assets specified in this form to Junior Achievement of Arizona, Inc. I understand that any contribution, once accepted by JAAZ, represents an irrevocable contribution and is not refundable to me for any reason.

Giver 1: Full Name (Please Print) Giver 2: Full Name (Please Print) - if applicable

Giver 1: Signature Date Giver 2: Signature - if applicable Date