Friends of Oflag 64 Stock Acceptance Procedure

The Board of Friends of Oflag 64 will abide by the Gift Acceptance Policy approved on April 30, 2024 to ensure all donations of stock or like securities fall within the guidelines of that policy.

Procedure for accepting stock/securities charitable donations.

1. Once a potential donor indicates a desire to donate securities, designated board members will review the type of securities to ensure there is no potential for conflict of interest and that acceptance will not compromise any of the core values of Friends of Oflag 64.
2. After Board approval, Friends of Oflag 64 treasurer sends the Friends of Oflag 64 Charitable Stock Donation Form (addendum 1) to the donor with any pertinent additional instructions.
3. The donor completes, signs the form and sends it to the donor's broker. (A Form is required for any additional transactions)
4. The donor's broker transfers designated stock to the brokerage account belonging to Friends of Oflag 64.
5. Once the Friends of Oflag 64 broker receives the stock, said broker will reconcile and convert the stock to cash.
6. Friends of Oflag 64 broker distributes cash to the Friends of Oflag 64 bank account.
7. The donor is notified the stock was received and is sent a receipt for the gift.

Each firm where the securities are held generally has their own gifting form. Above is simply an outline which takes you through the standard procedure.

Friends of Oflag 64, Inc., Charitable Stock Donation Form

A 501(c)(3) non-profit organization
EIN: #84-1889226
www.friendsofoflag64.org

To:_____ (Donor's Stock Broker)

At: _____ (Brokerage Firm)

_____ (Account #)

_____ (Name of Stock) Stock Contribution

_____ Number of Shares to be Donated

$_____ Estimated Value of Donation

Friends of Oflag 64, Inc Name of Charity

0756 DTC #

Ameriprise Financial Services, LLC Broker

83879559 Account #

Contact Information at Friends of Oflag 64:

Pat Thompson, Treasurer_____ Name
_____ Phone number
pthompson892@gmail.com_____ E-mail address

Contact Information at Ameriprise Financial Services:

Alexandra Bernstein, Client Service Associate___ Name
561.226.5871 _____ Phone number
Alex.Bernstein@ampf.com_____ E-mail address

_____ _____
Authorized by: Donor Signature Date

_____ Printed Name

(Addendum #1)