

Gifts of Stock

The Foundation for Endodontics accepts gifts of stock. A gift of appreciated stock can provide significant tax savings to donors. This process is an easy way to make an outright gift or a one-time payment toward your current pledge balance. If interested, a donor should proceed to their broker with the following information to initiate the gift and follow up by notifying the Foundation.

To transfer a gift of DTC-eligible securities, please ask your broker to initiate a DTC transfer to the American Association of Endodontists' Foundation.

Charles Schwab & Co., Inc
DTC#: 0164
Account Number: 6183-0572
Account Name: American Association of Endodontists Foundation

Please be sure to note your name and contact information in the gift instructions provided to your broker and Schwab.

For any other types of securities, or if you have any questions, please contact the OCIO Client Service Team, Fund Evaluation Group:

Phone: 513-977-4400
Fax: 513-806-2217
Email: OCIO@feg.com

Once these steps are completed, please fill out the form below and return to the Foundation for Endodontics via email at foundation@aae.org.

Please print clearly.

Full Name: _____

Expected Amount of Gift: _____

Please Select One:

- This is an outright gift
- Apply this amount to my outstanding pledge balance

Signature: _____

Date: _____