



Giftng Securities to Prestige Learning Institute

Instructions for giftng securities to Prestige Learning Institute

Donating securities that have appreciated in value to a charity such as Prestige Learning Institute can be an extremely tax-effective way of giving. Usually, the donor will be able to take the full market value of the securities on the date they are transferred as an itemized deduction.

How you can make a gift of securities depends on where those securities are held. The following instructions are intended to make this process as easy as possible.

For securities being held by a brokerage firm:

Tell your broker that you wish to donate the securities to Prestige Learning Institute. Instruct the broker to transfer the securities to:

Fidelity Investments

Attn: TOA Receives
P.O. Box 770001
Cincinnati, OH 45277

Account number: Z40194351
DTC Participant Number: 0226
PLI Contact Name: Michael Obringer

*For mutual shares, please see the following instructions page.

Important: When you have given these instructions for transfer, please notify PLI's Development Team at development@prestigeinstitute.org and provide the following:

- Number of shares you are giving
- Company in which stock is held
- Date of expected transaction

This will allow us to fully and accurately acknowledge your gift with a tax-deductible receipt.



For mutual fund shares held directly in an account with the mutual fund group: Ordinarily, you will have to provide the mutual fund written instructions to make the transfer. The signature of the account owner(s) on these instructions will have to be guaranteed by a bank or a brokerage firm. Although requirements may vary among mutual fund sponsors, instructions along the following lines should work:

Date: _____

I am the registered owner of account number _____, holding shares of _____ name of fund _____. I hereby instruct you to transfer _____ number of shares _____ of the fund to an account in the following name.

Prestige Learning Institute
5233 Bellaire Blvd
B590
Bellaire, Texas 77401

Fidelity Investments
Attn: TOA Receives
P.O. Box 770001
Cincinnati, OH 45277

Account number: Z40194351
DTC Participant Number: 0226
PLI Contact Name: Michael Obringer

By directing you to make this transfer, I intend to make a charitable gift of these shares to Prestige Learning Institute. If you need further information to complete establishing an account for PLI, please contact them directly.

Sincerely,

_____ Street Address



City and State

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