

## Asset Delivery Fact Sheet



Central Scholarship accepts gifts of stock/securities which may provide greater tax advantages than gifts of cash. When completing the asset transfer form, which can be obtained from your broker/banker/financial advisor, the following information may be helpful:

- Nonprofit Organization Name: **Central Scholarship Bureau**
- Nonprofit Organization Address: **6 Park Center Court, Suite 211, Owings Mills, MD 21117**
- Nonprofit Organization Contact Name: **Tierra A. Dorsey, President**
- Federal Tax ID: **52-6012589**

**Please Note:** To ensure a smooth transaction, please allow one business day so that there is sufficient time for brokers to be contacted and to obtain all of the appropriate information. Contact Central Scholarship at the following number to alert us that you are making a gift of stock/securities:

- Central Scholarship's main number: (410) 415-5558

**When contacting Central Scholarship regarding your gift of stock/securities, please be prepared to provide the following information:**

- Your name and association with Central Scholarship (i.e., board member, alumna, friend/donor)
- Fund or purpose of your gift
- Name and phone number of your broker/banker/financial advisor

There are three ways to transfer stock to Central Scholarship:

- **Deliver Stocks Electronically**
  - To transfer stocks electronically, you can notify Central Scholarship of your intention to transfer the stock by calling the number listed above; in addition, have your broker/banker/financial advisor contact Central Scholarship's brokers at **Morgan Stanley**
    - Attention: **Rob Friedman** of The Zolet Lenet and Fink Group at Morgan Stanley  
2330 W. Joppa Road, Suite 255, Lutherville, MD 21093 | 410-494-8368 |  
[Robert.J.Friedman@MorganStanley.com](mailto:Robert.J.Friedman@MorganStanley.com) | cc: [Joel.T.Fink@MorganStanley.com](mailto:Joel.T.Fink@MorganStanley.com)
    - Morgan Stanley Account Number: DTC 0015
    - Central Scholarship Account Number: Contact us at (410) 415-5558 for this information
- **Deliver Stocks by Hand**
  - To hand-deliver stocks, endorse the back of the stock certificate(s) in our presence or sign a separate stock assignment form, or stock power. In addition, we can arrange for a development officer to meet you at your home or office to receive the gift of stock.
- **Deliver Stocks by Mail**
  - To send stocks by mail, send the stock certificate(s) and the signed power(s) in separate envelopes. We recommend that the stock certificate(s) be sent by registered or certified mail, return receipt requested. Enclose a cover letter providing your name, address, and telephone number, along with any designated purpose for which the gift is being made. We will need a separate stock power form for each certificate of stock.

Please ensure the stock power(s) are signed exactly as the name reads on the stock certificates. Do not fill in Central Scholarship's name on the stock power. A stock power form is available from your broker/baker/financial advisor.