



## **Donation Of Highly Appreciated Securities To TEF Is As Easy Than 1-2-3!!!**

- 1.** Instruct your brokerage firm to transfer the desired position (ie 100 shares XYZ company) to the “Tailhook Educational Foundation DTC 0226 Account B3S738356.”
- 2.** Notify the Tailhook Educational Foundation via phone or email of your intended gift.
- 3.** Expect the transfer to be completed within two business days of providing your broker the required notification.

The Tailhook Educational Foundation will provide pertinent valuation information regarding your charitable contribution once the transfer is complete.

Points of contact:

Tailhook Educational Foundation: Captain Rodger Welch, USN (Ret) or Captain Greg Keithley, USN (Ret) 800-269-8267

Tailhook Educational Foundation Financial Advisor: Richard S. Carlquist, AIF® CFP®  
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