

# Stock Gift Form



SOCIETY FOR AMERICAN ARCHAEOLOGY

Each gift helps to ensure that SAA's programs will continue to enhance the lives and work of those who carry out the Society's mission.

Thank you for your interest in making a charitable gift to the Society for American Archaeology (SAA) in the form of a stock transfer. If you have questions at any time please reach out to Oona Schmid, Executive Director at 202-559-4580.

1. **Speak with your accountant or financial adviser about the unique benefits a stock transfer may provide.**
2. Provide your broker with the information below to electronically transfer your gift directly to our account
3. Notify us by completing and returning the form on the second page, this way we can capture your information for tax acknowledgement, as well as any special instruction for the use of the gift. This information is not forwarded to us from our brokerage firm when your gift is received.

**Custodian: Charles Schwab & Co., Inc.**  
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**Account # 8971-3549**  
**Donor: Your Name to Ensure Proper Recognition for Your Generosity**

**Contacts at SAA:**  
**Oona Schmid 202-559-4580 oona\_schmid@saa.org**  
**Contacts at CapTrust (Broker):**  
**Casey Veach 248-223-3892 casey.veach@captrust.com**

The value of transferred securities is determined on the recognized gift date, which is established when the donor relinquishes control of the securities. The average of the high and low trading prices on the gift date determine the value of securities for reporting purposes.

Society for American Archaeology  
PO Box 75747  
Chicago IL 60675-5747

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Please complete this form to notify the SAA of your gift, help ensure it is processed accurately and to allow a tax-acknowledgement to be issued . You may email this completed page to oona\_schmid@saa.org.

## Donor Information:

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## Select a Fund

Unrestricted Gift

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Matthew Tobin Cappetta Archaeological Scholarship Award

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General Endowment Fund

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Douglas C. Kellogg Fund

Other (please specify)  
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**Thank you again for considering SAA as the recipient of your charitable gift!**

**If you have any questions? Contact Oona Schmid at 202-559-4580**

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