

Procedure for Donating Appreciated Stock to the American Association of Variable Star Observers

Kevin B. Marvel, Second VP and Chair of Fundraising Committee

May 5, 2017

Securities held in a brokerage account:

Contact your broker and give them the following information for the Morgan Stanley Wealth Management advisors for the AAVSO:

DTC # 0015

FBO: American Assoc of Variable Star Observers C/O J Sokoloski W Goff

Account number: 707-027313-456.

In either case, please send an email or letter notification of the amount and type of stock being donated to the AAVSO at the following address:

Stella Kafka, AAVSO Director

49 Bay Street Road

Cambridge, MA 02138

skafka@aavso.org

A letter acknowledging your donation and its value on the date of receipt will be sent as soon as the receipt of the donation is verified by our investment account. This letter of acknowledgment will serve as your record for tax purposes. The tax ID number for the AAVSO is 04-2164402.

Please feel free to contact Stella Kafka, the AAVSO Treasurer or the Fundraising Committee Chair with questions.

Securities held outright by the donor (rare circumstance):

If you have actual securities you would like to donate, please contact the AAVSO treasurer or Fundraising Committee Chair for details on how to submit them to the AAVSO's investment advisor. The AAVSO can accept such securities, but a different procedure must be followed. Do not sign any securities until you contact us.