

Procedures for Transferring Securities:

1. When you make a gift of securities to the Buck Institute, please notify the Institute directly by including your name and address, the date of the instructions describing the transfer, the name of the stock, the number of shares, the estimated value, and the purpose of the gift. This information should be sent directly to:

Lisa Palma
Resource Development Department
Buck Institute for Research on Aging
8001 Redwood Boulevard
Novato, California 94945-1800

Tel: (415) 209-2027
Fax: (415) 209-2044
Email: lpalmaal@buckinstitute.org

2. If the stock you are donating resides in a brokerage or bank trust account, you should notify your stock broker or banker by telephone and follow up with a letter to transfer the stock to the Buck Institute account using the following information:

Buck Institute Broker: Charles Schwab & Co., Inc.

Address: Corte Madera Branch
403 Corte Madera Town Center
Corte Madera, CA 94925

Name on Account: Buck Institute for Research on Aging

Buck Institute Account Number: 7588-8165

DTC Number: 0164, Code 40

Representative: Bill Schrader
Tel: (415) 945-6404
Fax: (415) 945-6422

Buck Institute Federal Tax ID No.: 94-3030609

3. If your gift of securities is in the form of a stock certificate that is registered in your name, please mail the stock certificate(s) plus a signed stock power to the Buck Institute representative at the address provided above. Important Note: Be sure to mail the stock certificate(s) and stock power separately because, in the case of loss or theft, the stock can be transferred if the finder possesses both documents. Also, please note that the donor's signature on the stock power must be either notarized or guaranteed by a bank officer or stockbroker.

Valuation of Your Gift of Securities:

1. According to IRS regulations, your gift of securities is valued based on the date of transfer (not the date that instructions are made to the donor's stockbroker or the actual sale price). The acknowledgement letter from the Buck Institute will confirm the actual date of transfer as well as the number of shares donated.

2. It is the policy of the Buck Institute to sell all gifts of securities upon their receipt. The Institute will notify its broker of a gift of stock and will request its immediate sale. The actual value of the stock on the date of sale does not affect the valuation of your gift for tax purposes and is not reported to the IRS unless specifically requested.

3. The Resource Development Department records both the stock's gift value to the donor and the actual sale price in its gift records.

For more information, please contact:

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