



How to Make a Stock Gift to An Achievable Dream

To donate appreciated stock to An Achievable Dream (AAD), please contact your broker to initiate the transfer. Your broker can electronically transfer shares using our DTC number.

AAD has four accounts for stock donations. The last two lines in the instructions below indicate the organization. Please designate to which account you would like to gift stock by choosing one of the four organizations: An Achievable Dream Middle and High School, Inc., An Achievable Dream, Inc., An Achievable Dream Virginia Beach, or An Achievable Dream Endowment, Inc.

Brokerage: The Spencer Group at Morgan Stanley Smith Barney
701 Towne Center Drive, Suite 902
Newport News, VA 23606
Phone Number: (757) 873-3300
DTC Number: 0015-Morgan Stanley Smith Barney

Account Name: An Achievable Dream Middle & High School, Inc.

Tax ID#: 54-1682144

Account Number: 670-108027

Account Name: An Achievable Dream, Inc.

Tax ID#: 54-1621932

Account Number: 670-017094

Account Name: An Achievable Dream Virginia Beach

Tax ID#: 46-3211492

Account Number: 670-017091

Account Name: An Achievable Dream Endowment, Inc.

Tax ID#: 26-1392573

Account Number: 670-019984

Your broker should provide the following information directly to Amanda Rose, An Achievable Dream's Director of Finance & Administration, by calling 757-599-9472, ext. 27, or at arose@achievabledream.org.

- Donor's name and complete address
- Name and number of securities transferred
- Valuation of stock on date of transfer
- Any relevant notes regarding the gift's intention or purpose

Thank you!

