

Instructions for Donating Securities to the Perkiomen Valley Library at Schwenksville

Thank you for your gift of securities to the Library! In order to make the donation, please follow the steps below:

Step 1:

Electronic Transfer

Instruct your broker or investment administrator to transfer your stocks, bonds, mutual funds, or other securities to the Library's account at Vanguard. They will need the following information:

Perkiomen Valley Library Inc.
290 2nd Street
Schwenksville, PA 19473
610-287-8360

The Library's account is at Vanguard
Account #: 88036090488
Tax ID #: 23-7206224
Vanguard's DTC# (for stocks, bonds, ETF's): 0062
Vanguard's DTC# (for mutual funds): 5772
Vanguard's phone 877-662-7447

OR

Certificate Transfer

Registered certificate holder should complete the following two Vanguard forms. Forms are available for download on vanguard.com/serviceforms or by calling Vanguard Brokerage Services at 877-662-7447

- Irrevocable Stock/Bond Power Form. Requires original signature of certificate holder.
- Letter of Authorization to Deposit Stock and Bond Certificates. Requires original signature of certificate holder with Medallion Signature Guarantee. Shares are to be deposited to Perkiomen Valley Library Inc., account number: 88036090488

The certificate and 2 forms above should be sent by overnight delivery or registered mail

USPS mail:

Vanguard
Attn: DC
PO Box 982902
El Paso, TX 79998-2902

Overnight mail:

Vanguard
Attn: DC
5951 Lockett Court Suite A2
El Paso, TX 7993

Step 2:

Please notify the Library Manager that the securities have been transferred, since the donor's name is not always included in the transfer information. Email the Branch Manager Aileen Johnson ajohnson@mclinc.org or call 610-287-8360. Please provide us with the following information:

Name: _____

Address: _____

Phone: _____

I transferred _____ shares of _____

Date of transfer: _____

Step 3:

The Library will mail you a thank you letter recognizing the donation of the security for tax purposes. The value of your donation will be based on the closing price of the security on the date it is received into the Library's account.

If you have any questions, please contact the Aileen Johnson, branch manager, ajohnson@mclinc.org or 610-287-8360

Thank you for your generosity!

4/26/2024