



**Notification of Appreciated Stock Gift to  
Forward Learning Youth and Young Adults Inc.**

This letter is to notify you that I (we) will be donating the following stock to Forward Learning Youth and Young Adults Inc.:

Company Name: \_\_\_\_\_

CUSIP or Symbol: \_\_\_\_\_

Number of Shares: \_\_\_\_\_

Approximate Value: \_\_\_\_\_

Print Name(s): \_\_\_\_\_

Date: \_\_\_\_\_

Email: \_\_\_\_\_

Phone #: \_\_\_\_\_

**Donor, please provide the following account information to your broker to complete your stock gift:**

Receiving Firm Name: Charles Schwab & Co., Inc.

DTC Number: 0164, Code 40

For Further Credit Account Holder: Forward Learning Youth and Young Adults

For Further Credit Account Number: Contact us for the account number or XXXX-4697

**Please return this completed letter to:**

Forward Learning Youth and Young Adults  
C/O Jacobson & Schmitt Advisors  
8333 Greenway Blvd, Ste 330  
Middleton, WI 53562

Or Email: [Info@jandsadvisors.com](mailto:Info@jandsadvisors.com)

Or Fax: 608-662-7518

**For cash gifts or donations directly from your IRA Required Minimum Distribution, please mail checks made out to Forward Learning Youth and Young Adults to the above address.**

Should you have any questions or need any additional information, please feel free to contact Jacobson & Schmitt Advisors at 608-662-7500.