

# INSTRUCTIONS FOR DONATING SECURITIES

## ALL DTC-ELIGIBLE SECURITIES

All deliveries **MUST** include organization name and Schwab account number.

Certified Financial Planner Board of Standards, Inc.  
Schwab account: 6859-1606  
Delivery to DTC Clearing 0164, Code 40

## FED BOOK-ENTRY SECURITIES (E.G., TREASURY NOTES)

All deliveries **MUST** include organization name and Schwab account number.

JPM CHASE/CCC  
ABA #: 021000021  
Charles Schwab A/C G69873  
FBO: Certified Financial Planner Board of Standards, Inc., Account 6859-1606

## PHYSICAL DELIVERY

All deliveries **MUST** reference organization name and Schwab account number.

Certified Financial Planner Board of Standards, Inc.  
Schwab account: 6859-1606

### **Name and Address:**

Charles Schwab & Co.  
IS Document Control  
P.O. Box 982600  
El Paso, TX 79998-2600

### **Overnight Mailing Address:**

Charles Schwab & Co., Inc.  
IS Document Control  
1945 Northwestern Drive  
El Paso, TX 79912

## NOTIFICATION

Once the gift of securities is finalized, provide your name, date of transaction, type of security and number of shares to the development team at [DevelopmentTeam@CFPBoard.org](mailto:DevelopmentTeam@CFPBoard.org) or 202.379.2237.