

# STOCK TRANSFER INSTRUCTIONS

For partial or complete fulfillment of a pledge to the *Rooted in Learning* campaign through a gift of publicly held stock via electronic transfer, please call the Bergman Academy Office at (515) 274-0453 to receive the following information:

Account Name: Bergman Academy

Account Number: 945500606

Receiving Firm: TD Ameritrade

Receiving DTC: DTC 0188

Thank you for your gift!

Your support is essential to the Bergman Academy community for generations to come.

**Bergman Academy**  
100 45th Street  
Des Moines, IA 50312

**Questions?** For more information on making a pledge or completing your pledge transaction, please contact Megan Kassmeier, Director of Development, at [mkassmeier@bergmanacademy.org](mailto:mkassmeier@bergmanacademy.org) or (402) 719-6622 or Eric Heininger, Campaign Director, at [Eric.Heininger@edenplus.org](mailto:Eric.Heininger@edenplus.org) or (734) 775-7017.

## WAYS TO GIVE

Donors to the *Rooted in Learning* campaign have a variety of options to consider when making a charitable contribution. Bergman Academy accepts the following giving vehicles:

1. Cash
2. Check
3. Credit Card
4. ACH/EFT
5. Gifts of Stock
6. Gifts of Grain

Of the above examples, the first four are the most common methods for gifts to a campaign of this kind. Any donor choosing to give by cash or check will receive reminder statements from Bergman Academy according to the payment plan specified on his/her signed pledge form.

Donors indicating a desire to give using a credit card or ACH/EFT are asked to take into consideration the transaction fee, to turn in their signed commitment card, and then donate online on Bergman Academy's website—hover over the “Give” button on the website banner and click “Ways to Give” to find the online giving link.

In regard to stock donations, Bergman Academy has included additional Stock Transfer Instructions for this purpose. Donors indicating a desire to give a gift of stock should contact the school office after obtaining the appropriate forms from the company holding the stock.

Donors interested in giving a gift of grain should contact the school office.

All gifts are tax deductible to the fullest extent of the law. This guide provides general guidance only. For legal and tax advice, donors are asked to contact their attorneys, accountants or financial advisors.

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# SUGGESTED GIVING PLAN

## Gifts Schedule for Five Year Pledges

Total Amount	10% Initial Payment	Annual Payments	Semi-Annual Payments	Quarterly Payments	Monthly Payments	Weekly	Daily
\$75,000	\$7,500	\$15,000	\$7,500	\$3750	\$1,250	\$312.50	<b>\$44.64</b>
\$50,000	\$5,000	\$10,000	\$5,000	\$2,500	\$833	\$208.33	<b>\$30.00</b>
\$25,000	\$2,500	\$5,000	\$2,500	\$1,250	\$417	\$104.25	<b>\$15.00</b>
\$15,000	\$1,500	\$3,000	\$1,500	\$750	\$250	\$62.50	<b>\$9.00</b>
\$12,000	\$1,200	\$2,400	\$1,200	\$600	\$200	\$50.00	<b>\$7.14</b>

While it is not required, we strongly encourage all donors to make an initial payment of 10% at the time of their pledge. All gifts are tax deductible to the extent provided by law and may be remitted monthly, quarterly, semi-annually or annually.

Please make all checks and securities payable to **Bergman Academy**

The *Rooted in Learning* campaign accepts gifts in a variety of forms with an emphasis on those which can be used immediately.

Pledges allow campaign donors to consider more substantial commitments than are possible with one-time cash gifts. Stock and other property which can be easily liquidated are also options when considering your campaign gift. By making a gift of appreciated stock or property, you may reduce or avoid capital gains. Please consult your tax professional. If you are interested in making a stock gift, please contact Megan Kassmeier, Director of Development, at [mkassmeier@bergmanacademy.org](mailto:mkassmeier@bergmanacademy.org) or (402) 719-6622.

## TABLE OF GIFTS NEEDED

Gift Level	# of Gifts	# of Prospects Needed	Total Amount	Cumulative Total
\$500,000	2	6	\$1,000,000	\$1,000,000
\$250,000	4	12	\$1,000,000	\$2,000,000
\$100,000	6	18	\$600,000	\$2,600,000
\$50,000	12	36	\$600,000	\$3,200,000
\$25,000	18	54	\$450,000	\$3,650,000
\$10,000	22	66	\$220,000	\$3,870,000
\$5,000	25	75	\$125,000	\$3,995,000
Less than \$1,000	Many	Many	\$5,000	\$4,000,000
<b>Total</b>	<b>89</b>	<b>267</b>	<b>\$4,000,000</b>	<b>\$4,000,000</b>

