

BPD ALLIANCE STOCK, EFT & MUTUAL FUND TRANSFER INFORMATION

NEABPD is a 501(c)(3) nonprofit organization.
Contributions are tax-deductible to the fullest extent allowed by law.

TO START YOUR GIFT

For a seamless transfer, please connect Abby Ingber at thankyou@neabpd.org, directly with your financial advisor, brokerage contact, or account representative so we can coordinate and confirm both transfer and receipt of your shares.

When you email thankyou@neabpd.org, please include:

- Security: Stock, ETF, or Mutual Fund name and number of shares
- Estimated gift value and any pledge details (if available)
- Brokerage details: firm name, contact name, phone, and email

BPD Alliance Contacts

Organization: National Education Alliance for Borderline Personality Disorder (NEABPD)

Primary Contact: Abby Ingber, Executive Director

Email: thankyou@neabpd.org

EIN: 30-0033269

Mailing Address: 52 White Beeches Drive, Township of Washington, NJ 07676

Investment Advisor: Jeff de Valdivia, CFA, CFP®

Contact Details: jeffd@fleurus-ia.com, (203) 919-4980

TRANSFER INSTRUCTIONS

Stocks & ETFs - Publicly traded shares (e.g., GE, DIS, PFE, SPY, QQQ)

Receiving Firm: Charles Schwab

DTC Clearing #: 0164

Account Name: National Education Alliance for Borderline Personality Disorder (NEABPD)

Account #: 8871-8275

Mutual Fund Shares - Funds with five-letter ticker symbols ending in "X" (e.g., AEPGX)

If your firm is **ACAT-eligible**:

- **Receiving Firm:** Charles Schwab
- **ACAT Clearing #:** 0164
- **Account #:** 8871-8275

If your firm is **NOT ACAT-eligible**:

Please email thankyou@neabpd.org to establish a BIN#. Include your name, Contra-Firm Name, Ticker/CUSIP, Number of Shares and Contra-Firm Account Number

Stock Certificates or DRIPs

If your shares are held in certificate form or a direct reinvestment program (e.g., Computershare, Wells Fargo Shareowner Services), please contact thankyou@neabpd.org for assistance.