



52 White Beeches Drive,  
Township of Washington, NJ 07676  
[www.neabpd.org](http://www.neabpd.org)

# 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](mailto: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](mailto: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](mailto: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](mailto: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](mailto: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](mailto:thankyou@neabpd.org) for assistance.