

# In-Kind Stock Donation Transfer Form

Please complete this form to initiate a transfer of stock/securities as an in-kind donation. Deliver a copy of this completed form to your delivering broker to initiate the transfer, and send a copy to the receiving organization for tracking purposes.

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## 1. Donor Information

Donor Full Name:

Street Address:

City, State, Zip:

Phone Number:

Email Address:

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## 2. Delivering Brokerage Information

Please instruct your broker to transfer the shares using the details below.

Delivering Brokerage Firm:

Financial Advisor Name:

Donor Brokerage Account Number:

Broker Phone Number:

Broker Email Address:

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## 3. Description of Securities to Transfer

Name of Security / Stock:

Ticker Symbol:

Number of Shares / Quantity:

Estimated Value per Share:

Total Estimated Donation Value:

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## 4. Receiving Organization Information

Organization Name:

Receiving Brokerage Name:

DTC Number (Clearing Number):

Account Number:

Organization Contact Email:

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## 5. Authorization and Signature

By signing below, I authorize my delivering broker listed above to transfer the shares of stock described in Section 3 to the receiving organization account listed in Section 4.

Donor Signature (Print first to sign):

Date (MM/DD/YYYY):