

Donor Securities Transfer Instruction Form

Please complete this form to initiate a transfer of securities to our organization. Once completed, please sign and send this form to your delivering broker, and provide a copy to our development office for tracking and receipting purposes.

1. Donor Information

Donor Full Name:
Street Address:
City, State, Zip:
Phone Number:
Email Address:

2. Delivering Broker Information

Please instruct your broker to transfer the assets listed below from your account.

Delivering Brokerage Firm:
Financial Advisor/Contact Name:
Advisor Phone Number:
Donor Account Number at Delivering Firm:

3. Description of Securities to Transfer

Security Name / Description Ticker Symbol or CUSIP Number of Shares / Quantity

<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

4. Receiving Institution Information (For Broker Reference Only)

Receiving Charity/Organization:
DTC Number:
Account Number:
Contact Name/Department:

5. Authorization and Signature

I hereby authorize the transfer of the securities described above to the receiving organization. This transfer is a charitable contribution.

Donor Signature: Date:
Co-Donor Signature (if joint account): Date: