



Securities Transfer Request Form

Shares of securities can be transferred directly from your brokerage account to the HOPE Services account. Simply complete the form below and Send a signed copy to your broker. Only your broker can initiate the transfer. Some brokerage firms require this letter to be notarized. Please check with your broker for additional requirements. If you wish to make a gift of mutual funds, bonds, foreign or restricted stock, please contact Jenny Luciano at (408) 284-2887 or by email at jluciano@hopeservices.org as these require special handling. Thank you!

In addition to faxing or emailing this form to your broker, please also forward a copy to VP of Development, Jenny Luciano at HOPE Services – Fax # (408) 284-2861 or jluciano@hopeservices.org.

DATE: _____

TO: _____ (Broker Name)

_____ (Brokerage Firm)

_____ (Broker Phone Number)

Please accept this letter as your authorization to irrevocably transfer:
(Name of stock and Number of shares)

Which you hold in the name of:
(Account title at brokerage firm)

From my account number: _____

to the account of HOPE Services.

Please transfer via DTC as follows:

Account Name: HOPE Services
Bank Name: Wells Fargo Advisors
DTC#: 0141
Account Number: #3873-8601
Contact: Brad Frederickson
Phone: (408) 947-3111

Signature(s) of account owner(s):

NOTE: For your tax purposes, the value of the donated stock will be calculated using the average of the high and low prices for the stock on the date the stock is transferred into HOPE Services' account. For more information about tax deduction of donated stock, please see IRS Publications 526 (Charitable Contributions) and 561 (Determining the Value of Donated Property), and consult your tax advisor.