



hope services

Transforming lives through Hope since 1952

## Securities & IRA Transfer Request Form

Shares of securities & IRA 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.

In addition to faxing or emailing this form to your broker, please also forward a copy to Hope's Development Department to the attention of Ana Melara Glenn, Development Associate at [amglenn@hopeservices.org](mailto:amglenn@hopeservices.org), so we may properly account for and acknowledge the gift.

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: Pershing LLC

DTC#: 0443

Account Number:#33L303501

Contact: Sharon Harken

Phone: (650) 289-3118

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.

Tax ID # 94-1399287

Please indicate if account holder's employer  
will be matching this contribution to Hope  
Services. YES [ ] NO [ ]

Signature(s) of account owner(s):

\_\_\_\_\_  
Account Owner

\_\_\_\_\_  
Date

\_\_\_\_\_  
Account Owner

\_\_\_\_\_  
Date