



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.

Please also email your completed form to Hope's Development Department, Attention: Ana Melara Glenn, Development Associate, amglenn@hopeservices.org, so we may properly process the gift, *even if this is an anonymous donation.*

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

I wish this to be anonymous. YES [] NO []

My employer will be matching this contribution to Hope Services. YES [] NO []

Signature(s) of account owner(s):

Account Owner Date

Account Owner Date