

9845 Erma Road, Suite 312 San Diego, CA 92131 (858) 530-1031 • (800) 380-7370 (858) 530-1820 FAX www.shareholdersgroup.com

<u>Stock Donation Request Form</u> <u>Stock Delivery Via DTC</u>

NOTE: For use with non-retirement accounts only.

To Shareholders Service Group:

Please deliver from my/our account as follows:

Number of Shares	Security Description and Symbol or CUSIP	Tax Lot Date (if any)

From Account Number
Client Name(s)
Deliver to the following account:
To Account Name (exact name on the receiving account)
To Account Number
Receiving Brokerage Firm Name
Receiving Brokerage Firm DTC # (4 digit number)
For joint accounts, all parties must sign.
Client Signature Date

Client Signature

Please note: For charitable donations, you should separately notify the receiving account holder and the receiving firm of the donation.

SSG 2016 12

Date