Securities Transfer Request Form

LifeMoves
Breaking the Cycle of Homelessness

Thank you for your gift! Shares of securities can be transferred directly from your brokerage account to LifeMoves 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.

To confirm receipt of your generous gift, please ALSO forward a copy of this form to Donate@LifeMoves.org or fax to 650.685.5881.

My Name: _____

My Address/Phone/email: _____

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 LifeMoves.

Please transfer via DTC as follows:

Account Name: LifeMoves
DTC#: 0955
Account #: 011000046033
Broker: Bank of America
Contact: John Ostler
Phone: 213.861.5183

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 LifeMoves 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.