



Securities Transfer Request Form

Shares of securities can be transferred directly from your brokerage account to the Shelter Network of San Mateo County 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 Chris Canter at 650-685-5880 x115 or by email at ccanter@shelternetwork.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 Chris Canter, Director of Development, at Shelter Network of San Mateo County – Fax #650-685-5881.

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 Shelter Network of San Mateo County.

Please transfer via DTC as follows:

Account Name: Shelter Network of San Mateo County
DTC#: 0015
Account #: 112-154643-152
Broker: Morgan Stanley Smith Barney
Contact: Thomas Simmons
Phone: (650)853-4004

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 Shelter Network's 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.