



Securities Transfer Request Form

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

To confirm receipt of your generous gift, please ALSO forward a copy of this form to Helene Zimmerman at hzimmer@namisanmateo.org or fax to 650.638.1475.

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 NAMI San Mateo County.

Please transfer via DTC as follows:

Account Name: NAMI San Mateo County
DTC#: 0118
Account #: 496474362
Broker: TD AmeriTrade
Contact: Tom Hanna
Phone: 650.340.6007

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 NAMI San Mateo County 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.