



## Securities Transfer Form

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Shares of securities can be transferred directly from your brokerage account to the Boys & Girls Clubs of the Peninsula 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. Thank you!

**In addition to faxing or emailing this form to your broker, please also forward a copy to David Cruz at the Boys & Girls Clubs of the Peninsula – [dcruz@bgcp.org](mailto:dcruz@bgcp.org) or fax to 650-322-9042.**

**DONOR NAME:** \_\_\_\_\_

**DATE:** \_\_\_\_\_

**TO:** \_\_\_\_\_ (Broker Name)  
\_\_\_\_\_ (Brokerage Firm)  
\_\_\_\_\_ (Broker Phone Number)

**Please accept this letter as your authorization to irrevocably transfer:**  
(name of stock, number of shares)

\_\_\_\_\_  
\_\_\_\_\_

**Which you hold in the name of:**  
(Account title at brokerage firm)

\_\_\_\_\_  
\_\_\_\_\_

**From my account number:** \_\_\_\_\_

**to the account of the Boys & Girls Clubs of the Peninsula.**

**Please transfer via DTC as follows:**

**Account Name:** Boys & Girls Clubs of the Peninsula

**Charles Schwab Brokerage**

**DTC:** 0164 **Code:** 40

**Account #** 1768-8137

**Phone:** (800) 435-9050

**Signature(s) of account owner(s):**

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NOTE: The fair market value of your charitable gift of stock determines the value of your income tax deduction. It's the average between the high and low stock trading values, not simply the closing value on the day the transaction goes through. You may want to donate on a trading day where the stock price does not fluctuate. Also, clarify with your broker what day the stock will go through—the process can sometimes take longer than expected.