



## **INSTRUCTIONS FOR TRANSFERRING SECURITIES TO EASTER SEALS FOR OUTRIGHT GIFTS OR BEQUESTS**

Charles Schwab serves as Easter Seals' broker for receiving securities to fund outright gifts or bequests.

If you are transferring securities to establish a gift annuity, please see our instructions entitled "Easter Seals Stock Transfer Instructions for Annuities."

## **INFORM EASTER SEALS OF YOUR INTENT TO TRANSFER SECURITIES ELECTRONICALLY OR VIA MAIL**

It is important that you contact Easter Seals to inform us of your intent to transfer securities, electronically or via mail, to our brokerage account. To ensure that we will be able to identify and thank you and acknowledge your gift for IRS purposes, please inform us of your intent to transfer securities. Contact Mary Mucci, Senior Director, Planned Giving at (800) 221-6827, x7240 or [mmucci@easterseals.com](mailto:mmucci@easterseals.com).

## **SENDING SHARES ELECTRONICALLY**

If you hold shares in a brokerage account, you may request that your broker transfer shares electronically via the Depository Trust Company (DTC). Please provide your broker with the following information to transfer shares to Easter Seals via DTC:

**Firm:** Charles Schwab & Co. Inc.  
**DTC Number:** 0164  
**DTC Code:** 40  
**Account Name:** Easter Seals Inc.  
**Account Number:** 7224-1540

## **SENDING ACTUAL SHARE CERTIFICATES**

Please write account number **7224-1540** in pencil (**not ink**) on the front upper-right-hand side of each certificate.

Endorse the back of the certificate (**in ink**) as follows:

1. The signature line is towards the bottom, and noted by the words in small print just below the line "Notice: The signature to this assignment must correspond with the name as written upon the face of the certificate..." Please sign your name **exactly as it appears on the face of the certificate**. If the certificate is registered in joint names, both parties must sign. Also, indicate the date you are signing on the line marked "Dated".

Note: Do not sign the line with the label "Signature Guarantee" next to it.

2. In the space following the words "do hereby irrevocably constitute and appoint\_\_\_\_\_Attorney to transfer the said stock..." enter: "**Charles Schwab & Co., Inc.**" The certificate is now negotiable only by Schwab.
3. Leave everything else blank.
4. Send the certificates to Schwab by mail to the following address:

**Schwab Institutional / Team # 11  
P.O. Box 628290  
Orlando, FL 32862-9905**

We suggest using First Class, Certified Mail with Return Receipt. First Class, Certified Mail will get the package to its destination in 1 to 3 days. The Return Receipt service will provide proof that you mailed the certificate and will return a card to you with the date the item was delivered and the signature of the person who received it.

5. If you wish, send the certificates to Schwab by overnight delivery to the following address:

**Schwab Institutional / Team # 11  
1958 Summit Park Drive, Suite 500  
Orlando, FL 32810-5938  
Phone # 800-680-0794**

If you have questions, please contact Mary Mucci, Senior Director, Planned Giving, toll free at (800) 221-6827, x7240 or directly at (312)-551-7101, or [mmucci@easterseals.com](mailto:mmucci@easterseals.com).

Thank you for your thoughtful and generous gift to Easter Seals.