



## **Securities Transfer Request Form**

The Blind & Visually Impaired Center of Monterey County maintains an investment account with (name of financial institution). This account can be used to facilitate the transfer of various financial assets (equities, bonds, etc.). To initiate such a transfer the donor will need the on the following page.

If such a contribution is ether being considered or forthcoming we would ask that you:

- 1) Provide the The Blind & Visually Impaired Center of Monterey County with a letter of intent or a copy of your broker instructions; or
- 2) Notify Diana Trapani, Executive Director at 831-649-3505 x103 or via email at: [vision@blindandlowvision.org](mailto:vision@blindandlowvision.org) of your client's wishes.

This will allow us to identify the benefactor and to send a timely acknowledgement letter. The value of the gift will be based upon the average of the high and low price of the security on the day the gift is received in the The Blind & Visually Impaired Center of Monterey County's account.

If your client's security is held in certificate form, you can send the certificate directly to The Blind & Visually Impaired Center of Monterey County with a stock power, which needs to be guaranteed (not merely notarized) at your client's bank or brokerage. The certificate and stock power should be mailed in separate envelopes to (organization's address).

Please do not hesitate to contact Diana Trapani, Executive Director at 831-649-3505 x103 or via email at: [vision@blindandlowvision.org](mailto:vision@blindandlowvision.org) if you have any questions. We thank you and your client for considering the The Blind & Visually Impaired Center of Monterey County.

Please remember us in your will or trust.

Tax ID:#23-7221588

The Blind & Visually Impaired Center of Monterey County, Inc.  
225 Laurel Ave, Pacific Grove, CA 93950  
831-649-3505 [www.blindandlowvision.org](http://www.blindandlowvision.org)

# AUTHORIZATION AND CONFIRMATION OF DONATION OF STOCK

## INSTRUCTIONS TO BROKER

To: \_\_\_\_\_  
Name of stock broker and brokerage firm

From: \_\_\_\_\_  
Name(s)

I/We hereby authorize you to transfer stock/securities

**FROM:** Account # \_\_\_\_\_ in the name of \_\_\_\_\_

**TO: Pershing Account # 035196815 - The Blind & Visually Impaired Center of Monterey County - - DTC # 0443**

**STOCK/SECURITIES TO BE TRANSFERRED:**

Name	number of shares/units
_____	_____
_____	_____
_____	_____

Dated: \_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

**GIVE THIS PORTION TO YOUR STOCK BROKER**

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**COPY OR CLIP OFF AND GIVE THIS PORTION TO The Blind & Visually Impaired Center**

## NOTIFICATION TO The Blind & Visually Impaired Center of Monterey County

TO: Ms. Diana Trapani  
Executive Director

On the date shown below, I/we have donated stock into the brokerage account of The Blind & Visually Impaired Center of Monterey County

### **SELECT ONE OR MORE IF APPLICABLE:**

\_\_\_\_\_ to be applied to my/our pledge for the year \_\_\_\_\_  
number of shares and name of company

\_\_\_\_\_ to be applied to my/our pledge for the year \_\_\_\_\_ **(or)**  
number of shares and name of company

**This gift is in memory of/in honor of/ in thanksgiving for \_\_\_\_\_ (circle one)**

Dated: \_\_\_\_\_ Name(s): \_\_\_\_\_