



Securities Transfer Form

Thank you for your interest in donating securities to Curry Senior Center. Please follow the instructions below and contact Director of Development Arlo Bushnell at abushnell@curryseniorcenter.org or 415-572-7093 if you have any questions. Please take the following steps to make your gift of securities.

If your brokerage account is with Fidelity, all you have to do is contact your broker and tell them you'd like to donate the securities and give them Curry Senior Center's **account # 636-226631**.

If your account is not at Fidelity, you'll need to request a DTC transfer. To do this, provide your broker Curry Senior Center's **account # 636-226631** and **DTC# 0226**. If your broker asks, **Curry's Tax ID # is 23-7362588**.

IMPORTANT: To alert the Curry Senior Center that you are making a charitable gift of securities, please fill out the following information and return it to abushnell@curryseniorcenter.org.

1. Gift Information

# of shares	Ticker Symbol	Securities Description	Approximate Value*

* The actual gift value will be determined according to the IRS rules on the valuation of gifts of securities.

2. Broker Information:

- BROKER/ADVISOR NAME (IF NO BROKER, PLEASE ENTER "NONE"): _____
- Brokerage Firm: _____
- Brokerage Contact Phone: _____
- Brokerage Contact Email: _____

3. Donor Information

- Name: _____
- Email: _____
- Phone Number: _____
- Address: _____

Aging with health, hope and dignity.



Information:

Fidelity's DTC #: 0226

Account Name: Curry Senior Center

Account Type: Corporate

Tax ID #: 23-7362588

Account #: 636-226631

Fidelity's Mailing Address:

Fidelity Investments

Attn: TOA Receives

PO Box 770001

Cincinnati, OH 45277-0036

FIDELITY CONTACT

To contact Fidelity about making a transfer of securities call 866-755-6372 and select Option 3.

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