



EMBRACE RELIEF FOUNDATION

STOCK DONATION INSTRUCTION FORM

Dear Valued Supporter of Embrace Relief:

Thank you for your interest in donating stock in support of Embrace Relief's humanitarian causes! This document will provide a step-by-step guide through the process to ensure your gift is received promptly.

Embrace Relief accepts stock donations in two forms: electronic and physical certificates. Please select one of these two options and follow the steps below:

OPTION 1: DONATING SHARES ELECTRONICALLY

- **1)** If you hold shares in a brokerage account, you may request that your broker transfer shares electronically via the Depository Trust Company (DTC). We have created a [sample letter](#) that you can share with your broker to begin the transaction. Or you can simply provide the following information to your broker to transfer shares to Embrace Relief Foundation via DTC:

Firm: Charles Schwab & Co. Inc.

DTC Number: 0164

DTC Code: 40

Account Name: Embrace Relief Foundation

Account Number: 5933-2758

- **2)** If you have questions, please email Dana Coppola, Embrace Relief development officer, at dana.coppola@embracerelief.org.

OPTION 2: DONATING PHYSICAL CERTIFICATES OF STOCK

- **1)** On each certificate of stock you intend to donate, write account number 5933-2758 **in pencil** (not ink) in the upper-right-hand corner of both sides of the certificate.
- Endorse the back side of each certificate you intend to donate. The signature line will be towards the bottom, and will be 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 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.

- **3)** In the space following the words "do hereby irrevocably constitute and appoint _____ Attorney to transfer the said stock..." enter "Charles Schwab & Co., Inc." on the blank line. This will ensure the certificate is now negotiable only by Schwab.
- **4)** Leave everything else on the certificate blank.
- **5a)** Send the certificates to Schwab by mail to the following address:

Schwab Institutional / Team # 1
P.O. Box 628290
Orlando, FL 32862-9905

We suggest using first-class mail with certified mail and a return receipt. First-class mail will deliver your certificate(s) to the destination within 1-3 business days. Certified mail with a return receipt will provide proof that you mailed the certificate, and will return a card to you with the date the item was delivered, plus the signature of the person who received it.

- **5b)** Alternatively, you may instead send certificates to Schwab through overnight delivery to the following address:

Schwab Institutional / Team #1
1958 Summit Park Drive, Suite 500
Orlando, FL 32810-5938