

# Donor's Letter to Stock Broker

Date:

To: Broker:

Address:

Attn:

Phone:

Fax:

Subject: Charitable Gift Stock Transfer Instructions for Account # \_\_\_\_\_

Dear:

I am requesting that the following charitable stock transfer be made. Please complete the transfer of \_\_\_\_\_ shares of \_\_\_\_\_ common stock from my account. This is a donation from me to Friends House Retirement Community Development Fund.

The shares should be delivered via DTC wire transfer:

**DTC Clearing 0164, Code 40**  
**Charles Schwab & Co**  
**Friends House Account #36193867**

Please contact **Trillium Asset Management (617.423.6655)** to inform them that

- (1) a charitable stock transfer has taken place,
- (2) the name of the donor
- (2) the date of stock transfer and
- (3) the name and number of shares transferred.

This transaction is important and I greatly appreciate your immediate attention. If you have any questions concerning this transfer, please call the **Business Manager, Friends House Retirement Community, 17340 Quaker Lane, Sandy Spring, MD 20860 at (301) 924-5100**. Please advise me when this transfer is completed. Thank you in advance for your prompt attention to this matter.

Yours truly,

cc: Business Manager  
 Friends House Retirement Community  
 17340 Quaker Lane  
 Sandy Spring, MD 20860