

Stock Gift Transfer Instructions for Donors

Recipient Name: Smith-Lemli-Opitz Foundation

Fed ID# - 23-2635206

Information needed from donor – provide to Gretchen Noah: gnoah@cord.edu

- 1) Designation
- 2) Name, Address, Phone, Email
- 3) Amount of Gift
- 4) The date stock gift transfer was submitted to financial institution for processing

Information needed by your financial advisor to process stock gift transfer:

- 5) Transfer Instructions listed below (our information is bolded):

Delivering Account Number & SSN: (Your information)

Delivering Account Registration: (Your information)

Delivery Information: Another Firm or Financial Institution

Type of Delivery: Charitable Gift

Stock Information: Share Quantity, CUSIP/Symbol, Security Description: (Your information)

Receiving Account Registration: Smith-Lemli-Opitz Foundation A Non-Profit Organization

Receiving Account Type: Non-Profit

Receiving Account Number: 5040-1713

Firm Name: LPL Financial

DTC #: 0075

For any questions regarding how to complete a stock gift transfer, please contact your financial advisor at your financial institution for processing. We appreciate your consideration in donating to the Smith-Lemli-Opitz Foundation.

These instructions have been provided by our financial advisor and his firm. If any information needed for the transfer to process has not been provided, please contact:

Choice Wealth – 701-282-3100, Siverson/Birmingham Team

Assistant: Jennifer Leher, j.leher@choicewealth.com