



## Transfer Form for Gift of Publicly Traded Stock

Please complete this form to initiate a gift of securities to Achieve Tahoe.

Give this form (original) to your broker.

Keep a copy for yourself, and email a copy to: [haakon@achievetahoe.org](mailto:haakon@achievetahoe.org)

### Your Information

First Name \_\_\_\_\_ Last Name \_\_\_\_\_

Mailing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Name of Your Broker \_\_\_\_\_

Brokerage Firm \_\_\_\_\_

Brokerage Account Number (where stock is coming from) \_\_\_\_\_

### Authorization to Donor's Stockbroker

In reference to the account number above, please transfer via DTC

\_\_\_\_\_ of \_\_\_\_\_  
(# of shares) (Name of Securities)

\_\_\_\_\_ of \_\_\_\_\_  
(# of shares) (Name of Securities)

To: Morgan Stanley  
Receiving firm DTC #: 0015  
Account: Achieve Tahoe 102-069190-303  
Attn: Sterling Dalatri

\_\_\_\_\_  
Signature (as it appears on brokerage acct) Date

\_\_\_\_\_  
Additional Signature (if necessary) Date