



DTC TRANSFER INSTRUCTION SHEET

INSTRUCTIONS FOR GIFTS OF STOCKS OR MUTUAL FUNDS

Thank you for supporting HomeCare & Hospice of the Valley and our life-enhancing care. Donating stocks or other securities takes just three easy steps.

- 1. Print**, complete this form, and send to your financial advisor.
- 2. Send** a copy of the form to HomeCare & Hospice of the Valley attn: Development, via fax 970.927.6659 or giving@HCHOTV.org as donor information does not always transmit to the charity.
- 3. Contact** our Development office at 970-930-6008 or giving@HCHOTV.org if you have any questions or need additional information.

COMPLETE THE FOLLOWING INFORMATION

To (donor's financial advisor)

Telephone Fax

Please use this form as authorization to transfer the securities listed below from my account to Northern Trust as my gift to HomeCare & Hospice of the Valley

From (donor name)

Mailing address

Preferred phone (circle one: home/work/cell)

Name of stock or mutual fund Number of shares

Date of gift Estimated value of gift

Who, in addition to the legal donor, should receive recognition for this gift (if applicable)?

Signature

DTC Transfer Instructions for Financial Advisors:

Please deliver by DTC to:

DTC #: 2669

Agent ID #: 20290 Northern Trust

Institution ID #: 78500 Alpine Bank

Account #: 17-92314

Client Name & A/C: Hospice of the Valley 60000702

Tax ID: 26-3651313.