



## Transfer Intent Form: Gift of Publicly Traded Securities

**Step 1. Notify C.A.S.E.:** *Prior to transferring securities, please fax or email this form to:*

Tamara Arsenault, Development Director,  
Center for Adoption Support and Education  
3919 National Drive, Suite 200, Burtonsville, MD 20866  
Tel: 301-476-8525 | Fax: 301-476-8526 | E-mail: arsenault@adoptionsupport.org

**Step 2. Provide Your Contact Information:** We want to acknowledge your generosity! You will receive a mailed receipt letter recognizing the type and number of shares donated and the date received by C.A.S.E.

Name \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_  
Zip Code \_\_\_\_\_ Phone \_\_\_\_\_  
Email \_\_\_\_\_

**Step 3. Confirm Your Intent:** This form confirms my intention to donate the following securities to C.A.S.E. without restriction and which can be sold by C.A.S.E. at any time they consider appropriate.

Name and Number of Shares \_\_\_\_\_  
Name and Number of Shares \_\_\_\_\_  
Donor's Signature \_\_\_\_\_ Date \_\_\_\_\_

**Step 4. Provide Your Broker/Delivering Custodian Information:**

Name of Firm \_\_\_\_\_  
Broker's Name \_\_\_\_\_  
Phone \_\_\_\_\_ Email \_\_\_\_\_

**Step 5. Share C.A.S.E. Broker Details:** To transfer securities, advise your broker of the following:

**Name of Account:** TD Ameritrade  
**Institution:** TD Bank  
**Account Number:** 869235009  
**DTC Number:** 0188

**FOR ENDOWMENT GIFTS ONLY**  
**Name of Account:** Merrill Lynch  
**Institution:** Merrill Lynch  
**Account Number:** 707-03429  
**DTC Number:** 8862