



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