



Stock Transfer Instructions

Thank you so much for your commitment to helping homeless families in Santa Barbara! Complete the form and submit to your broker to begin the process. Be sure to notify Transition House so that we can provide your tax receipt as soon as possible. Thank you again for your generous donation!

Stock Transfer Checklist

Fill out the following form and send to your broker.

Send a copy of this form to Transition House. Our contact information is provided on Page 2.

Please note, stock should be transferred directly to Transition House's account. Please, do not send stock certificates to Transition House.

Broker Name:

Broker Street Address:

**Broker City, State, Zip
Code:**

Broker Phone Number:

Dear

I would like to make a tax deductible contribution to Transition House. Please transfer the following securities from my account to Transition House's account using their transfer information provided. Please send Transition House a confirmation showing the date of transfer and value of stocks upon transfer to donations@transitionhouse.com. Thank you for your assistance.

Transition House Transfer Information:

Broker: Stifel, Nicolaus & Co., Inc.

Contact: Syd Walker

Address: 30 E. Figueroa Street, Suite B, Santa Barbara, CA 93101

Account Name: Transition House

Account Number: 20151826

Routing Number #: 021000018

Broker Number: SG12

Tax ID: 77-0099755

DTC NO. 0793

Donor Name:

Donor Address:

Donor City, State, Zip Code:

Donor Phone Number:

Name on Donor Account:

Donor Account Number:

Number of Shares:

Security Name:

Ticker Symbol (If known):

Account Holder 1 Signature:

Account Holder 2 Signature:*

*Joint accounts require signatures from both account holders.

To notify Transition House of this gift, please e-mail, fax, or mail a copy of this form to:

Transition House
ATTN: Natalie Graves or Gina Whitefoot
425 E. Cota Street, Santa Barbara, CA 93101
Tel: 805.966.9668
Fax: 805.966.6331
donations@transitionhouse.com

Transfer Date:

Value of Stocks on Date of Transfer:
