TRANSFER FORM FOR DONATING SECURITIES TO LOS ALTOS ROTARY ENDOWMENT FOUNDATION (LAREF)

Rotary Club of Los Altos | Los Altos Rotary Endowment Fund

INSTRUCTIONS TO DONOR OF SECURITIES:

1. Please complete this form and provide to your broker with the below Los Altos Rotary Endowment Foundation (LAREF) account information. Your broker will use the information in this form to transfer your stock to LAREF's account.
2. Also, please provide a copy of this filled out form to LAREF by one of the following methods:
   a. Scanned copy sent to LAREF by email or
   b. U.S. mail to Los Altos Rotary Endowment Fund (LAREF), P.O. Box 794, Los Altos, CA 94023

Note: In order for LAREF to acknowledge your generous gift in a timely way, it is important that LAREF receives a copy of this document at the same time as the stock donation. After receiving this document and the securities have been transferred, LAREF will sell the stock and send you a written acknowledgment of your gift for tax purposes and donor recognition. For more information on this process, please email LAREF at laref@losaltosrotary.org

Today's Date _____

Your Brokerage Firm Name: _____

Brokerage Address: _____

City / State / Zip: _____

Account Number: _____
(Where stock is being transferred from)

Direct gift to: ___ Los Altos Rotary Endowment Foundation (LAREF) Impact Fund (LAREF endowment)
___ Other LAREF purpose, Please describe: _____

Broker: In reference to the aforementioned account, please deliver via DTC, _____ shares of
(Quantity)

_____ to Los Altos Rotary Endowment Foundation via:
(Name of Securities)

Charles Schwab & Co. Inc.
P.O. Box 982600, El Paso TX 79998-2600
Re: Los Altos Rotary Endowment Foundation
DTC # 0164 Account # 7930-3645 Tax ID #: 94-2575930

_____ _____
Donor Name (please print) Donor Signature