

The Uprooted Way Securities Transfer Letter

Date: _____

Broker Name: _____

Broker Phone Number: _____

Dear: _____

I/We wish to make a charitable gift to **The Uprooted Way**. Securities should be transferred directly to The Uprooted Way team at Merrill Lynch as follows:

- Wealth Management Advisor Jeffrey Rush 310.858.4623 Jeff_Rush@ml.com
- Wealth Management Associate Taliah Cabrera 310.858.4686 taliah_cabrera@ml.com
- Address: 2049 Century Park East, Suite 1100, Los Angeles, CA 90067
- Fax: 310.907.5177

Account Number: **208-03378** DTC #: **8862** Stray Cat Alliance Tax ID#: **88-0804598**

A confirmation letter showing the date of transfer and value of security on transfer date would be helpful. Thank you for your assistance.

Sincerely,

Account Holder

Account Holder 2

PLEASE FAX OR MAIL A COPY OF THIS FORM TO THE UPROOTED WAY

ATTN: Tiffany Green

*Brokerage firms are prohibited from releasing the name of the donor of gifts of securities. It is, therefore, imperative that you notify The Uprooted Way of your gift of securities prior to the transfer or sale so that we can ensure that you are given proper credit for the gift.

***The Uprooted Way** does not accept restricted gifts of securities unless approved by the organization's Board of Directors. Please contact Tiffany Green if you have any questions about gifting restricted securities to the organization. 203-912-0254

***FOR ALL DONATIONS:** The value of the gift will be established on the date of the transfer of the security. **The Uprooted Way** is authorized to sell the securities as soon as it is determined to be prudent and/or appropriate. The proceeds from the sale of securities will be invested in accordance with the investment policies of the organization.