



Stock/Securities Transfer Form

IMPORTANT

1. Please complete this form and forward it to your financial advisor with your applicable account information.
2. As you make your transfer, please also forward a copy of this form to the John Austin Cheley Foundation c/o Development Director by email at giving@cheleyfoundation.org. It is important that JACF is notified of stock transfers in order for us to accurately identify the donor and designate the gift.

Donor Name: _____

Donor Financial Institution and Financial Advisor Name:

Donor Address: _____

Donor Telephone: _____ Email: _____

Name of Security: _____

Number of Shares: _____

Gift Purpose or Designation: _____

Who, in addition to the legal donor, should receive recognition for this gift? _____

Please use this form as authorization to transfer the securities listed above from my account to Charles Schwab & Company as my gift to JACF.

Signature: _____ Date: _____

DTC TRANSFER INSTRUCTIONS *for Financial Advisors*

For gifts of securities to the John Austin Cheley Foundation, please deliver by DTC to:

Account Name:
John Austin Cheley Foundation

Broker:
Charles Schwab & Company

Account Number:
4760-6054

DTC Number:
0164, Code 40

JACF Tax ID:
48-1077337

IMPORTANT

For proper donor recognition, transfers must include the following information:

- Donor's name and address
- Name of security and number of shares
- Purpose of gift
- If applicable, additional names for joint recognition