



GIFTS OF STOCK OR MUTUAL FUND TRANSFER

1 Please complete this form and forward it to your financial advisor.

2 Please also send a copy of this form to Susan M. Zellner, Individual Giving Director, at 312.602.9429 or szellner@illinois.wish.org.

TO (DONOR'S FINANCIAL ADVISOR)

TELEPHONE

EMAIL

FAX

Please use this form as authorization to transfer the securities listed below from my account to Schwab as my gift to Make-A-Wish Foundation® of Illinois.

FROM (DONOR NAME)

ADDRESS

CITY / STATE / ZIP

TELEPHONE

EMAIL

NAME OF STOCK

NUMBER OF SHARES

GIFT PURPOSE

SIGNATURE

DTC Transfer Instructions for Financial Advisor

For gifts of stock or mutual fund shares to Make-A-Wish Foundation® of Illinois, please deliver by DTC to:

DTC Clearing 0164, Code 40

Schwab Account Number:
9403-0301

Schwab Account Name:
Make-A-Wish Illinois Stock Clearing

If the transfer is unable to be completed via DTC, contact Schwab Transfers Group at 602.355.9003 for further delivery instructions.

IMPORTANT

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

- Donor name and address
- Name of stock or mutual fund and number of shares
- Estimated value
- Purpose of gift