



## 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 Lisa Bakker, Individual Giving Director, at 312.602.9464 or [lbakker@illinois.wish.org](mailto:lbakker@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