



## GIFTS OF STOCK OR MUTUAL FUND TRANSFER

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

Please also send a copy of this form to Linda Parck, Senior Gift Officer, at 312-602-9420 or [lpark@illinois.wish.org](mailto:lpark@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