

STOCK GIFT INFORMATION

Donor Name: _____

Donor Address: _____

Name of Stock: _____

of Shares: _____ Stock Symbol: _____

Expected Date of Gift: _____

Delivering Broker/Institution:

Name: _____

DTC Participant #: _____

Contact Name & Phone Number: _____

Please provide these instructions to the existing Brokerage Firm as they will need to initiate the transfer

Stock Delivery Instructions

Securities eligible for Depository Trust Company (DTC)

Deliver to: **Charles Schwab & Co, Inc.
DTC Clearing 0164, Code 40
Custodian A/C #: 1831-1366
Custodian A/C Name: WeConservePA- Project & Ops**

*Please complete and fax/email to
Cornerstone Advisors Asset Management **prior** to transfer.*

Cornerstone Email: operations@cornerstone-companies.com

Cornerstone Fax: (610) 867-8614

Cornerstone Phone: (610) 694-0900

THANK YOU!