

## STOCK TRANSFER INSTRUCTION SHEET

### IMPORTANT

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

2. Please also forward a copy of this form to Montgomery College Foundation via email to [craig.eozzo@montgomerycollege.edu](mailto:craig.eozzo@montgomerycollege.edu) or mail to the Montgomery College Foundation address above. This form of communication is important in the gift receipt process, as donor information does not always transmit through the DTC wiring system.

If you have any questions, please contact Craig Eozzo at (240) 479-1300 or [craig.eozzo@montgomerycollege.edu](mailto:craig.eozzo@montgomerycollege.edu)

\_\_\_\_\_  
To (Donor's Financial Advisor)

\_\_\_\_\_  
Telephone

\_\_\_\_\_  
Fax

Please use this form as authorization to transfer the securities listed below from my account to the gift account of Montgomery College Foundation at Charles Schwab.

\_\_\_\_\_  
From (Donor Name)

\_\_\_\_\_  
Address

\_\_\_\_\_  
Telephone

\_\_\_\_\_  
Fax

\_\_\_\_\_  
Name of Securities

\_\_\_\_\_  
Number of Shares

\_\_\_\_\_  
Gift Purpose

\_\_\_\_\_  
Signature

### DTC Transfer Instructions for Broker and Financial Advisors

For gifts of securities to Montgomery College Foundation, please deliver by DTC to:

**Account Name:** Montgomery College Foundation  
**DTC:** #0164  
**Code:** 40  
**Account #** 8609-4655  
**Broker:** Charles Schwab and Co., Inc.  
Montgomery College Foundation EIN: 52-1267008  
**Phone:** 1-602-355-9003  
**Contact:** Mr. Joseph Kantakevich | Financial Advisor EagleStone Wealth Advisors, Inc.  
**Telephone:** 301-924-2160  
**Email:** [jkantakevich@estwa.com](mailto:jkantakevich@estwa.com)

### 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