

# Stock Transfer Instructions

Broker: Mike Bell, Jr. at D.A. Davidson & Company  
10400 NE 4<sup>th</sup> St Ste 400  
Bellevue WA 98004

Contact Ali Fialho  
425-467-2208

**Acct Number: 5571-8174**  
**DTC Number: 0361**

## **Ways to transfer stock**

### **1. Electronic transfer of stock**

- a. It is advised that donors send an email or dated letter to Hopelink and/or D.A. Davidson alerting us of the pending transfer. The letter should state the following:

“I gift and share \_\_\_\_\_ shares of \_\_\_\_\_ stock from my account to Hopelink’s account #: Office 5571-8174 at D.A. Davidson & Company.”

*Note: This letter is very important as it will allow Hopelink to identify who is donating the shares upon receipt of the transfer.*

- b. If transfer brokerage is not D.A. Davidson, an ACAT Transfer must be done. Please contact your broker and then include in the donor letter the name of donor brokerage and Hopelink’s broker’s name (Mike Bell, Jr.). Also include the DTC number 0361.

### **2. Send certificates directly to Hopelink**

- a. Reissue (if possible) certificates in Hopelink’s legal name with the agency’s tax I.D. number as follows:  
Hopelink  
#91-0982116
- b. Send certificate along with gift letter (see 1.a. above) to Mike Bell, Jr. at D.A. Davidson or Josalyn Ford at Hopelink. We will value the certificates on the date of transfer. In addition to a gift letter, you will need to sign a stock power if you have a certificate in your name and want to deposit it into Hopelink’s account at D.A. Davidson.

Hopelink Contact: Josalyn Ford, Vice President, Development  
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