hopelink
hopelink.org

Redmond Center
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Stock Transfer Instructions

Broker: Mike Bell, Jr. at D.A. Davidson & Company
10400 NE 4th 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 EIN: 91-982116

b. Send certificate along with gift letter (see 1.a. above) to Mike Bell, Jr. at D.A. Davidson or Kim Alva 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: Kim Alva
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