



## Stock or Bond Transfer Instructions

### FIS Wealth Outsourcing

- Participant/DTC #5409
- F/B/O Bank of Marin, #74-2068-01-8
  - F/C Account Name: Vivalon
  - F/C: 61-0003-01-4
  - Free Deliveries: ND – 61-0003-01-4

### Vivalon Contact

Bryttni Juve

(415) 456-9062 x4800

[donations@vivalon.org](mailto:donations@vivalon.org)



Sample letter if stock is held in a brokerage account

Date

Mr./Ms. Present Broker's name

Brokerage Firm Name

Brokerage Firm Address (where actual account is located)

City, State, Zip

Dear Broker:

This letter confirms my request of today, (enter date) and authorizes (enter brokerage firm name) to transfer the following stock from my account, titled (enter full account name), and # (enter account number), in the following manner:

SHARES (or \$ amount of Bond)(describe actual amount)

Price as of (today's date) (broker may fill this in)

Total Value \$(enter approximate amount if to be completed by broker)

TRANSFER TO THE ACCOUNT OF:

FIS Wealth Outsourcing

Participant/DTC #5409

F/B/O Bank of Marin, #74-2068-01-8

F/C Account Name: Vivalon

Free Deliveries: ND - 61-0003-01-4

As owner/trustee of this account, I am empowered to authorize for above transactions. I appreciate your prompt execution of this transfer.

Sincerely,

(Donor signature)

(type donor name beneath signature)

cc: Yvonne Roberts, Vivalon