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GIFT OF PUBLICLY TRADED SECURITIES

INSTRUCTIONS

- 1. This form is intended for the use of the donor and is to be completed and submitted by the donor.
2. Questions regarding how to complete this form or questions regarding the gift can be directed to the Foundation.
3. To ensure the donor receives a receipt for tax records, the donor should email or mail a copy of this completed form to the Foundation address above.
4. To execute the gift, the donor should provide the completed copy of this form to his/her broker.
5. Brokers: please use the following information in ACATS in remitting securities to Charles Schwab.

Brokerage Firm: CHARLES SCHWAB
Account Name: HOLSTON CONFERENCE FOUNDATION
Account Number: 12122910
Phone Number: 865-690-8124
DTC Number: 0164, Code 40

DONOR INFORMATION

Name:
Address:
City: State: Zip:
Email: Phone:

RECIPIENT INFORMATION

Name:
Address:
City: State: Zip:
Email: Phone:

DONATION INSTRUCTIONS

Anonymous Donation: Yes No
Name of Security:
Number of Shares:
Approximate Value: \$
Specific Designation: Yes No
Designation Explanation:

Donor Signature: Date:

FOUNDATION USE ONLY
Date received: Received by: