



### Securities Transfer Form

*Thank you for making a gift of stock to YES! To ensure that your gift is properly received and credited, please fill out and send this form to Development Director Devika Saxena at [devika@yesfamilies.org](mailto:devika@yesfamilies.org) or 3029 Macdonald Ave, Richmond, CA 94804.*

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Name of Securities: \_\_\_\_\_ Number of Shares: \_\_\_\_\_ Date of Transfer: \_\_\_\_\_

Donor Name (Legal): \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Donor Name (as you wish to be acknowledged): \_\_\_\_\_

I would like to remain anonymous

In Honor of or  In Memory of:

\_\_\_\_\_

Please direct my gift to the area of greatest need

I/we designate this gift to fund:

\_\_\_\_\_

YES Nature to Neighborhoods' broker is:

North Berkeley Wealth Management  
1820 Solano Avenue  
Berkeley, CA 94707

\*Pershing, LLC is the custodian of this account

Our account details are:

Account Title: YES Nature to Neighborhoods  
Account Number: QAN-227780  
Depository Trust Company (DTC) Number:  
0443 EIN: 03-0458294

After we receive this form and our broker confirms the donation of securities, YES will issue an official acknowledgment letter to you. All contributions are tax-deductible to the fullest extent provided by law. For tax purposes, the value of the stock will be an average of the high and low prices on the date of the gift. Please contact your tax advisor for complete tax deductibility rules. Please contact Devika Saxena, [devika@yesfamilies.org](mailto:devika@yesfamilies.org) for any questions.