

Gift Processing Center

Offline Securities Gift Form

email to: development@internationalneighbors.org

Donor Contact Information

*First Name	Middle	*Last Name	Date
*Street 1		Day Phone	Evening Phone
Street 2		Fax Number	
*City	*State	*Zip Code	*Email address

Investment Firm Information

*Investment Firm Name			
Broker First Name	Broker Last Name	Street 1	
*Broker Phone Number	Extension	Street 2	
Fax Number		City	State Zip Code

Asset Information

*Symbol	Asset Name	*Number of Shares	Price/Share

Gift Held At:

- ☐ The gift is held in an account at a **brokerage firm**.
- ☐ The gift is held in the form of a stock or bond **physical certificate**.
- ☐ The gift is a **mutual fund purchased directly** from the mutual fund company and not held in a brokerage firm account.
- ☐ The gift is a stock or bond (or other debt instrument) **purchased directly from the corporation** or government without the assistance of a stock broker ("book entry").

Gift Information

Purpose of Gift

**Required fields.*

Brokerage Firm: Charles Schwab
 Account Name: International Neighbors
 Account Number: 0455-3953
 DTC: 0164