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# DTC TRANSFER OF SECURITIES LETTER OF INSTRUCTION

# for Gifts of Securities to Mason Health Foundation (MHF)

**IMPORTANT**

1. Please complete this form and forward it with the DTC transfer instructions found on the bottom of

this page to your **Brokerage Firm**.

1. Please forward a copy of this completed form to **Jennifer Capps at MHF** as Donor information does

not always transmit through the DTC transfer system.

**Email:** [jcapps@masongeneral.com](mailto:jcapps@masongeneral.com) **Fax:** (360) 427-4448 **Mail:** PO Box 1668, Shelton, WA 98584

If you have any questions, please contact Jennifer Capps, MGHF at (360) 427-3622, [jcapps@masongeneral.com](mailto:jcapps@masongeneral.com) or

Mark Mager, Financial Consultant, LPL Financial at 360-432-5201, [mark.mager@lpl.com](mailto:mark.mager@lpl.com)

To [Donor’s Investment Broker]:

Telephone: \_\_\_\_\_\_\_\_ Fax:

# Please use this form as my/our authorization to transfer the securities listed below

# from my account to LPL Financial as my gift to Mason Health Foundation.

From [Donor’s Name(s)]:

Address:

Telephone: \_\_\_\_\_\_\_\_ Fax:

Number of Shares Symbol Name/Description of Security Account Number

Unrestricted or restricted to:

Signature(s):

***Thank you for choosing Mason Health Foundation in your charitable giving!***

**DTC Transfer Instructions:**

# LPL Financial DTC # 0075

**For the account of Mason Health Foundation account number 2374-5847**

**MHF Tax Identification Number 91-1529293**