

## **Gift of Stock / Appreciated Securities**

## **Stock Transfer**

The simple way to gift appreciated securities from your brokerage to the Epilepsy Foundation of Minnesota.

e first where your stock is held.
shares
stock from my account to:
cial Services, Inc.
St. Paul, MN 55101-2136
ct Phone: 651.298.1616 or Toll Free 800.444.0582
IN THE NAME OF: Epilepsy Foundation of MN
dation DTC Number: 0221
on(s) named on your account).

## Donor should consider the following when making this gift:

- Notify the Epilepsy Foundation of Minnesota 651.287.2307 that you are making this transfer.
- Select appreciated securities held no longer than one year.
- Ask your broker to deliver shares with your lowest cost basis.
- Adjust your records to reflect the delivery of those specific shares.
- Fill out, sign, and give this form to your broker prior to transfer day.
- Select the day you wish to make each transfer and call your broker early to request s/he make the transfer before the market closes.