

**SAMPLE OF A LETTER OF INSTRUCTION TO BROKER TO TRANSFER STOCK TO
BOYS & GIRLS CLUBS OF MONTEREY COUNTY**

Donor Name(s)

Address

Telephone Number

Date

Name of Broker

Financial Institution/Company

Address

Re: Letter of Instruction to transfer securities

Dear _____:

I wish to irrevocably contribute _____ shares of _____ stock to the
Boys & Girls Clubs of Monterey County as a gift for [choose one]:

☐ *General Operations/Unrestricted*

☐ _____ *(specify purpose)*

Please transfer these shares as soon as possible, but no later than (specify date) _____
from my Account # _____ to the Boys & Girls Clubs of Monterey County's Account:

Wells Fargo Investments

DTC # 0733

Account # 83633244

Account Name: Boys & Girls Clubs of Monterey County

If there are any questions about this transfer of stock, please call me at _____ (phone
number). Thank you for your prompt attention to this request.

Signature/Donor Name

Signature/Donor Spouse if applicable

cc: Boys & Girls Clubs of Monterey County
P.O. Box 97
Seaside, CA 93955

SAMPLE OF DONOR GIFT NOTIFICATION LETTER TO BOYS & GIRLS CLUBS OF MONTEREY COUNTY

Donor Name(s)

Address

Telephone Number

Date

Mrs. Donna Ferraro
CEO/President
Boys & Girls Clubs of Monterey County
P.O. Box 97
Seaside, CA 93955

Dear Mrs. Ferraro:

I wish to provide support to the Boys & Girls Clubs of Monterey County. Therefore, I have instructed my broker to irrevocably transfer _____ shares of _____ stock to Boys & Girls Clubs of Monterey County on or before _____ (date).

The gift is to be used for [choose one]:

- ☐ *General Operations/Unrestricted*
☐ _____ *(specify purpose)*

Please issue a gift receipt as follows:

Donor name(s)

Donor Address

Email

I do/do not wish this gift to remain anonymous.

If there are any questions about the designation of this gift or the transfer of stock, please call me/us at _____ (phone number).

Sincerely,

Signature/Donor Name

Signature/Donor Spouse if applicable