Benton Franklin Humane Society

Letter of Instruction For Mutual Fund and Securities Donations

The Letter of Instruction (LOI) is required if you are transferring securities or mutual funds. This Letter of Instruction is not required if you are transferring cash or physical stock certificates*.

Please complete the letter and submit as follows:

Instructions

Send to BF Humane Society:

Copy of the Letter of Instruction

You MUST return a copy of the completed Letter of Instruction to BF Humane Society before initiating a securities transfer to ensure your donation is properly credited.

THEN send to the firm currently holding the securities:

• Original Letter of Instruction with Medallion Signature Guarantee

(The Medallion Signature Guarantee may not be required by all securities firms in order to initiate your transfer. You should contact your particular firm for their requirements. Your bank can provide a Medallion Signature Guarantee.)

*Physical stock certificates may require a Third Party Release Form and additional paperwork.

Send to:

BF Humane Society Attn: Shelter Manager 1736 E 7th Ave Kennewick, WA 99337

Telephone: 509.374.4235

Letter of Instruction

1. ACCOUNT INFORMATION **Donor's Holding Firm Information** Name of Company Firm Mailing Address Daytime Telephone City Zip Ζi Please accept this letter as my authorization to irrevocably transfer a portion of the positions from my account with your firm to the Benton Franklin Humane Society. From: Account Number Account Name(s) shares of Name of Security or Mutual Fund* Number shares of _ Name of Security or Mutual Fund* Number shares of . Name of Security or Mutual Fund* Number shares of Number Name of Security or Mutual Fund* Please deliver all eligible securities to: DTC#: Custodian: Pershing LLC Beneficiary Account Name: **Benton Franklin Humane Society** Beneficiary Account Number: P5A600768 Shares should be transferred in kind and are not to be liquidated. *Please note that some securities firms may not be able to transfer Mutual Fund holdings directly to the Pershing LLC account listed above. If you encounter this situation, please contact BF Humane Society and we will assist you in facilitating the transfer. 2. SIGNATURE All parties on the account must sign the letter. (Include additional signatures as necessary) Signature of Owner Name (Please Print) Stat Zip Mailing Address: Street City Telephone Number Email Medallion Signature Guarantee - If Required by securities firm (Signature guarantees can be obtained at most financial firms) Date Signature of Authorized Officer Name of Institution and Title