

# ParentsCAN Gift Of Securities Instructions

**1** Please complete this form and forward it to your financial advisor.

**2** Please send a copy of this form via fax, 707-253-2244 or email [chrisr@parentscan.org](mailto:chrisr@parentscan.org), as donor information does not always transmit through the DTC wiring system.

**3** If you have any questions, please contact Chris Roth, Development Director at 707-253-7444 ext. 114 or email [chrisr@parentscan.org](mailto:chrisr@parentscan.org).

Please use this form as authorization to transfer the securities listed below from my account as my gift to ParentsCAN.	
To (Donor's Financial Advisor)	
Telephone	Fax
From (Donor Name)	
Address	
Telephone	Fax
My Account Number	
Name of Security	
Number of Shares/Ticker Symbol	
Gift Purpose	
Who, in addition to legal donor, should receive recognition for this gift?	
Signature	

## DTC Transfer Instructions for your Financial Advisors

For gifts of securities to **Napa Valley Child Advocacy Network Inc., dba ParentsCAN**, please deliver by DTC to:  
 Institution Name: National Financial Services  
 DTC #: **0226**  
 Account Name: Napa Valley Child Advocacy Network Inc.  
 Account # GBK-126096

**IMPORTANT** For proper donor recognition, transfers must include the following information:

- Donor's name and address
- Name of security and number of shares
- Purpose of gift
- If applicable, additional names for joint recognition.

**Mutual Funds** It is recommended that you or your broker contact Jon Roth at Principal (916-462-9050) when gifting units of a mutual fund. The procedure for doing so may vary from one mutual fund to another. In some cases, the units may be transferred directly to our gift account via DTC. In other cases, our agency may be required to open an account with the fund and have the gifted units transferred into that account.

