

STOCK / SECURITIES TRANSFER INSTRUCTIONS



MONTAGE Health Foundation

40 Ryan Court, Suite 200
Monterey, CA 93940
T (831) 658-3630 F (831) 625-4695
donations@montagehealth.org

Security Transfer Letter

Date:

BROKER

BROKERAGE

Name
Phone
Email

Firm
Address
Account Name
Account #

Dear Broker:

Effective (date), please transfer (number) shares of (company name) (ticker symbol)

From my account, referenced above, via the following instruction:

Merrill Lynch DTCC: 8862

The Cass Group
Merrill Lynch, Pierce, Fenner & Smith Inc.
3775 Via Nona Marie Suite 255
Carmel, CA 93923

Sandra Dee, Registered Private Wealth Associate
T 831.625.7038 F 831.465.5348
sandra.dee@ml.com

For credit to:
Montage Health Foundation #5NQ-02110
Tax ID # 81-2889645

This transfer represents an irrevocable charitable contribution to Montage Health Foundation, as of this date, for the benefit of the (name of fund/project at Montage Health).

Please notify Montage Health Foundation on the day of the transfer as detailed below. Should there be any questions, you may contact me at (daytime phone number).

Thank you,

Signature

Street Address

Name (Printed)

City State Zip