



Letter of Instruction for Share Transfer to Senior Community Centers of San Diego

Client Information:

Name _____

Account Number _____

Stock Type _____

Number of shares to transfer _____

Desired date of transfer _____

Transfer Instructions:

To: Charles Schwab

DTC: 0164

Account Title: Senior Community Centers of San Diego – Escrow

Account Number: 9199-5187

Contact: Will Beamer

Contact Info: (858) 509-9500

Please contact Amy Harmon at amy.harmon@servingseniors.org or 619-487-0623 regarding this transfer to receive appropriate acknowledgement and IRS tax notification.

Senior Community Centers
525 14th St, Suite 200
San Diego, CA 92101
www.servingseniors.org

You should always consult with your tax advisor or financial planner to determine how this gift option impacts your specific financial situation.