



Letter of Instruction for Share Transfer to Serving Seniors

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: Serving Seniors Cash Reserves
Account Number: 9199-5187
Contact: Will Beamer
Contact Info: (858) 509-9500

Please contact Lori Gremel at 619-487-0608 regarding this transfer to receive appropriate acknowledgement and IRS tax notification.

Lori Gremel, Chief Development and External Affairs Officer
Serving Seniors
525 14th Street, Suite 200
San Diego, CA 92101

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