



## **INSTRUCTIONS FOR TRANSFERRING SECURITIES TO EASTERSEALS TO ESTABLISH ANNUITIES**

Wells Fargo Bank serves as Easterseals' broker for receiving securities to establish annuities.

If you are transferring securities to fund an outright gift or fulfill a bequest, please see our instructions entitled "Easterseals Stock Transfer Instructions for Outright Gifts or Bequests."

### **INFORM EASTERSEALS OF YOUR INTENT TO TRANSFER SECURITIES ELECTRONICALLY OR VIA MAIL**

It is important that you contact Easterseals to inform us of your intent to transfer securities, electronically or via mail, to our brokerage account to fund your gift annuity. To ensure that we will be able to identify and thank you and acknowledge your gift for IRS purposes, please inform us of your intent to transfer securities. Contact Easterseals' planned giving department at (800) 221-6827, x7240 or by email at [giftplanning@easterseals.com](mailto:giftplanning@easterseals.com).

### **SENDING SECURITIES ELECTRONICALLY**

If you hold shares in a brokerage account, you may request that your broker transfer shares electronically via the Depository Trust Company (DTC). Please provide your broker with the following information to transfer shares to Easterseals via DTC:

**Firm:** Wells Fargo Bank, N.A.

**DTC Number:** 2027

**Account Name:** EASTER SEALS INC

**Account Number:** 66904000

### **SENDING ACTUAL SHARE CERTIFICATES**

Please write account number **66904000** in pencil (**not ink**) on the front upper right-hand side of each certificate.

Endorse the back of the certificate (**in ink**) as follows:

1. The signature line is towards the bottom, and noted by the words in small print just below the line "Notice: The signature to this assignment must correspond with the name as written upon the face of the certificate...." Please sign your name **exactly as it appears on the face of the certificate**. If the certificate is registered in joint names, both parties must sign. Also, indicate the date you are signing on the line marked "Dated".

Note: Do not sign the line with the label "Signature Guarantee" next to it.

2. In the space following the words "do hereby irrevocably constitute and appoint\_\_\_\_\_Attorney to transfer the said stock..." enter: "**Wells Fargo Bank, N.A.**" The certificate is now negotiable only by Wells Fargo
3. Leave everything else blank.
4. Send the certificates to Wells Fargo by overnight mail to the following address:

**Attn: Planned Giving Administration  
Wells Fargo Bank, N.A.  
MAC: D4000-062  
One West Fourth Street, 2<sup>nd</sup> Floor  
Winston-Salem, NC 27101**

If you have any questions, please contact Easterseals' planned giving department, toll free at (800) 221-6827, x7240, or by email at [giftplanning@easterseals.com](mailto:giftplanning@easterseals.com).

Thank you for your thoughtful and generous gift to Easterseals.