

**Publicly Traded Securities  
Letter of Instruction**

\_\_\_\_\_  
DATE

\_\_\_\_\_  
NAME OF YOUR BROKER

\_\_\_\_\_  
FIRM/COMPANY

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
CITY, STATE, ZIP

I wish to make a gift of stock to Family Caregiver Alliance. Please accept this letter authorizing the transfer:

# \_\_\_\_\_ SHARES    **OR**    \$ \_\_\_\_\_ (Dollar Amount)

Of \_\_\_\_\_  
Name of Stock/Symbol

# \_\_\_\_\_ SHARES    **OR**    \$ \_\_\_\_\_ (Dollar Amount)

Of \_\_\_\_\_  
Name of Stock/Symbol

From my account # \_\_\_\_\_ and transfer securities electronically to:

Account Name:        Family Caregiver Alliance  
Broker:                Charles Schwab  
DTC #                 0164  
Account Number:    7956-6305

Family Caregiver Alliance Tax ID: 94-2687079

Sincerely,

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
PRINT NAME

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
CITY, STATE, ZIP

\_\_\_\_\_  
EMAIL ADDRESS

\_\_\_\_\_  
PHONE NUMBER

In order to initiate your gift transfer, please complete this form with your broker and return a copy to FCA by fax at (415) 434-3308 or by email at lsheridan@caregiver.org