

Sertoma Star Services Securities Transfer Request Form



Please complete this form and send it to your broker or financial advisor. Broker paperwork may be needed.

Please send a copy of the completed form to:
Patricia Trebe
ptrebe@sertomastar.org
or fax to (708) 755-8047

Please deliver by DTC to:
Charles Schwabb
DTC #: 0164
Account #: 1694-4655
Tax ID #: 23-7294685

Donor Information

_____ First Name	_____ Middle Name	_____ Last Name
_____ Address Line 1		
_____ Address Line 2		
_____ City	_____ State/Province	_____ Zip/Postal
_____ Phone Number		
_____ Email		

Gift Designation

Tell us how you wish us to use your gift. You can leave this blank, and we will use your gift to help the area of greatest need. (Please indicate if you would like it to remain anonymous)

Account Information

_____ Account Title	
_____ Account Number	
_____ Account Holder	_____ DATE
_____ Joint Account Holder	_____ DATE

Broker Information

BROKER/ADVISOR NAME (IF NO BROKER, PLEASE ENTER "NONE")

BROKERAGE FIRM

BROKER/ADVISOR PHONE NUMBER

# of Shares or Approx. Value	Security Description	Ticker Symbol

If you have any questions or want to give mutual funds, bonds, or foreign or restricted stock, contact Patricia Trebe at (708) 888-7418.