



## Securities Transfer Instructions

To ensure your transfer is effective in the same year it is given, it is important the transfer be initiated on or before December 15 of that year. We cannot guarantee that later transfers will be completed by December 31.

### DONOR

1. Provide your broker/transfer agent with instructions to transfer \_\_\_ number of shares of \_\_\_\_\_ stock to Lutheran Social Services of the National Capital Area, Inc (“LSSNCA”) (EIN 53-0207407) at Frontier Advisors, LLC. Detailed information for your broker is below.
2. Contact Jacob Barclay at [barclayj@lssnca.org](mailto:barclayj@lssnca.org), or (202) 852-1102 to inform LSSNCA about the pending transfer.
3. Tell LSSNCA the program designated to receive the proceeds or whether it should go to greatest needs.
4. Designated Program:
  - Where my gift is needed most
  - Children, Youth, and Family Services
  - Refugee Immigrant Services
  - CARE for Newcomers

### BROKER/TRANSFER AGENT

Please contact Rick Lesan at Frontier Advisors, LLC to advise of the transfer

- Office:(703) 634-9556 / (877) 263-2381
- email: [rlesan@frontieradvisors;lc.com](mailto:rlesan@frontieradvisors;lc.com)

LSSNCA’s Charles Schwab Account Number: 2312-0562  
Name of Donor: \_\_\_\_\_  
Stock being transferred: \_\_\_\_\_  
Cusip number of stock being transferred: \_\_\_\_\_  
Number of shares of stock being transferred: \_\_\_\_\_  
DTC number of LSSNCA broker/transfer agent: 0164

*\*To transfer physical certificates of securities, please contact LSSNCA (202) 852-1102. Please note these transfers may take 60 days or longer.\**