



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 Charles Schwab & Co., Inc. More detailed transfer information is below.
2. Contact Jacob Barclay at 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

LSSNCA INVESTMENT ADVISOR

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

- Office: (703) 634-9556
- email: rlesan@frontieradvisorsllc.com

FOR TRANSFER AGENT

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
Charles Schwab Asset Transfers Team direct line: (877) 263-2381

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