



## 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](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
  - Services for New Americans

### LSSNCA INVESTMENT ADVISOR

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

- Office: (703) 634-9556
- email: [rlesan@frontieradvisorsllc.com](mailto: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.\**