



SECURITIES TRANSFER FORM

Purpose:

This form is used to facilitate the Irrevocable Transfer of Securities (e.g., stock, mutual funds, exchange traded funds) from your Brokerage Firm directly to the brokerage account held for the benefit of Cupertino Symphonic Band ('CSB'), a non-profit 501(c)3 tax-exempt organization.

Donor Instructions: Please deliver this completed form directly to your Broker/Investment Advisor.

Donor Information:

Donor First Name(s): _____

Donor Last Name(s): _____

Donor Address: _____

Donor City: _____ State: _____ Zip Code: _____

Phone: _____ Email: _____

To My Broker/Investment Advisor: Please accept this request as authorization to irrevocably transfer the following securities as described below, as a charitable gift to the Cupertino Symphonic Band (CSB). The CSB accepts most publicly traded securities including but not limited to individual stocks, bonds, mutual funds and exchange traded funds.

Security 1:

Security Name: _____ Security Symbol: _____

Number of Shares: _____ Owner Name(s): _____

Security 2:

Security Name: _____ Security Symbol: _____

Number of Shares: _____ Owner Name(s): _____

Donor Signature(s): _____

Broker/Investment Advisor Instructions:

To be donated to the Cupertino Symphonic Band account as follows:

- Brokerage Account: LPL Financial
- Account Name: Cupertino Symphonic Band
- Account Number: XXXX-XXXX (to be supplied upon request)
- DTC Number: 0075

*Please forward this form to Ron Matsui at Common Sensonomics Wealth Management:
ronmatsui@commonswwm.com*

Questions? Call Ron Matsui (650-419-8620) at Common Sensonomics Wealth Management