



Family Giving Tree™

Bringing Hope and Joy to Those in Need

## Instructions for Gifting Stock Positions

RE; The Family Giving Tree

LPL A/C #3947-2959

DTC #0075

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Contact the Financial Institution (Brokerage Firm, Bank, etc.) that holds the stock position.

Ask them to initiate the “gifting” through the DTC System (Electronic Transfer System)

Provide “The Family Giving Tree” **LPL Account Number 3947-2959** and **DTC Number 0075**. If necessary, the Financial Institution will provide a form that will need to be filled and signed by the stock owner.

**If any questions, please call LPL Transfer Department: 800-877-7210 X5348**

**LPL Financial, 4707 Executive Dr. San Diego, CA 92121-3091**