



Stock or Securities DTC Transfer Instructions

IMPORTANT

1 Please complete this form and forward it to your financial adviser.

2 Please also forward a copy of this form to the Chicago House Development team via email at development@chicagohouse.org, as donor information does not always transmit.

If you have any questions, please contact Tyler Hough in Development at 773.248.5200x376 or at development@chicagohouse.org.

TO (DONOR'S FINANCIAL ADVISER)

TELEPHONE

FAX

Please use this form as authorization to transfer the securities listed below from my account to Fidelity Investments to Chicago House.

TELEPHONE

FAX

FROM (DONOR NAME)

ADDRESS

CITY | STATE/PROVINCE | COUNTRY

TELEPHONE

FAX

NAME OF SECURITY

NUMBER OF SHARES

GIFT PURPOSE

LIST ADDITIONAL NAME FOR JOINT RECOGNITION

SIGNATURE

DTC TRANSFER INSTRUCTIONS FOR FINANCIAL ADVISERS

For gifts of stocks or securities to Chicago House, deliver by DTC to:
Fidelity Investments
Account # 005-219545
DTC # 0226
Chicago House and
Social Service Agency

CONTACT

Tyler Hough
development@chicagohouse.org
773.248.5200x376

IMPORTANT

For proper donor recognition, transfer must include the following information:

- Donor's name and address
- Name of security and number of shares
- Purpose of gift
- If applicable, additional names for joint recognition

VALUATION

The value of your gift is calculated by using an average of the high and low prices of the security on the date that it enters our account. This information is included in our acknowledgement letter, which can be used as proof of your donation for tax purposes.