

**THE PLACE**

**Stock Transfer Delivery Instructions**

Thank you for making a gift of stock to The Place for programs that *ignite the potential in youth to exit homelessness and lead self-determined, fulfilled lives.*

Please fill out both pages of this form, and email it to Andy.Petersen@ThePLACEcos.org; or mail a hard copy to:

Andy Petersen
The Place

423 East Cucharras Street
Colorado Springs, CO 80903

Please note: *We ask our Advisor / Broker to sell gifts of stock within 48 hours of receipt, utilizing the funds to operate our general programs that support youth experiencing homelessness.*

Contributor Contact Information

|  |  |
| --- | --- |
| Name |  |
| Address |  |
| City, ST Zip |  |
| Phone |  |
| Email |  |
| Colorado Tax ID or Social Security Number |  |

Donated Stock/Investment

|  |  |
| --- | --- |
| Name of Company |  |
| Ticker Symbol (if available) |  |
| Number of Shares to Contribute |  |
| Approximate Date of Transfer |  |

***Please notify your Financial Advisor/Broker that All DTC Eligible Securities deliver to:***

DTC Clearing 0725

FAO: The Place

Account No. 532H7012

Raymond James & Associates, Inc.
880 Carillon Pkwy
St. Petersburg, FL 33716
DTC Securities

Contact Information of the Contributor’s Financial Advisor or Broker

*This information is helpful to our team if there are any questions. However, completing this information is optional* ***IF*** *you are contacting your broker directly and providing them with Urban Peak Colorado Springs account delivery information.*

|  |  |
| --- | --- |
| Financial Institution |  |
| DTC # |  |
| Name of Advisor / Broker |  |
| Advisor / Broker Phone |  |
| Advisor / Broker Email |  |

For questions about the stock delivery process at our brokerage firm, please contact Gina Reever at 719.577.4170 or gina.reever@raymondjames.com. The Place works with the local office of Joshua Waymire, CFP, CIMA, Senior Vice President of Fulcrum Wealth Consulting, affiliated with Raymond James & Associates, Inc. Gina is in his office.

**The Place**423 East Cucharras Street
Colorado Springs, CO 80903
Andy Petersen, Director of Development
719-338-9257 Office / 425-446-2341 Cell