

THE PLACE
Stock Transfer Delivery Instructions



thePLACE
a former affiliate of Urban Peak

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 Cucharas 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 Cucharas Street
Colorado Springs, CO 80903
Andy Petersen, Director of Development
719-338-9257 Office / 425-446-2341 Cell