

# General Information and Policy

## On the Boards Stock Donation Form

IMPORTANT: The account and DTC numbers below sometimes change. Please contact OtB prior to initiating your donation to confirm that the information below is current.

1.
  - Charles Schwab
  - Contact: Beth Steinhaus/206.621.8832 or Jay Turley/206.624.9000
  - Account # 4959-1891
  - Account Name/Registration: On the Boards
  - DTC # (needed for Transfer) is **0164**
2. Shares transferred should be from one company.
3. OtB will acknowledge the number of shares donated only, not the value
4. The securities will be held and/or sold at On the Boards' sole discretion
5. Contact On the Boards' Finance Director at (206) 217-9886 x1019 for any questions.
6. Please email this form to [jennyg@ontheboards.org](mailto:jennyg@ontheboards.org) immediately after Transfer Attention:  
Jenny Gerber

---

Donor's Name:

Campaign Name and Year – please complete one form for each campaign & corresponding year:

- Annual Fund Drive FY19 (7/1/18 – 6/30/19)
- Annual Fund Drive FY20 (7/1/19 – 6/30/20)
- Annual Fund Drive FY21 (7/1/20 – 6/30/21)

Name of Security Company who handles the transfer:

Contact Person and Phone #:

---

Date of Transfer	Security Name	Quantity

---

For Official On the Boards Office Use Only

Date Securities received by OtB:

Date Securities sold by OtB:

Commission Amt:

Net Income:

Confirmed for OtB by:

PPS (at receipt) PPS (at sale):

---

Date of Settlement One Copy to Development – One Copy to Finance

---