

# US SAILING SECURITIES TRANSFER INSTRUCTION SHEET



PLEASE FOLLOW THESE STEPS:

- 1) Please complete this form, and forward it to your financial advisor. If your donation includes mutual funds, please have your broker contact our Raymond James representative before the transfer is initiated as some preliminary steps may be required. The Raymond James contact information is shown below.
- 2) Send a copy of this form to your US Sailing Major Gift Officer or US Sailing's Development Department at [development@ussailing.org](mailto:development@ussailing.org), as donor information does not always accompany the securities when transferred.

\_\_\_\_\_

Date

\_\_\_\_\_

To (Your Financial Advisor)

\_\_\_\_\_

Telephone

\_\_\_\_\_

Email

Securities Transfer Information for Financial Advisors
Raymond James: DTC Number 0725
United States Sailing Assoc. Inc: Account 776HM979
Contact at Brokerage Firm: Natalia Callahan <a href="mailto:natalia@callahanadvisory.com">natalia@callahanadvisory.com</a>
Phone number: (410) 712-6211
US Sailing Tax ID number: 13-1671529

Please use this form as authorization to transfer the securities listed below from my account to Raymond James as my gift to the United States Sailing Association, Inc.

**IMPORTANT**

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

- Donor's name and contact information
- Name of security and number of shares
- Designation of gift

\_\_\_\_\_

From (Donor Name)

\_\_\_\_\_

Email

\_\_\_\_\_

Telephone

\_\_\_\_\_

Name of Security

\_\_\_\_\_

Number of Shares

\_\_\_\_\_

Gift Designation: Fund Name

\_\_\_\_\_

Signature

If you have questions, please contact us at (401) 342-7900 or [development@ussailing.org](mailto:development@ussailing.org).