



## **ELECTRONIC TRANSFER INSTRUCTIONS FOR GIFTS OF SECURITIES**

**For securities or mutual funds held in a brokerage account:** please provide your broker with written instructions to transfer stock from your account directly to the Hope Heart Institute's account using the following information:

<b>Account Name:</b>	<b>The Hope Heart Institute</b>
<b>Account Number:</b>	<b>335-04E28</b>
<b>Financial Institution:</b>	<b>Merrill Lynch</b>
<b>DTC Number:</b>	<b>5198</b>
<b>Tax I.D. Number for The Hope Heart Institute:</b>	<b>91-1138000</b>

Please contact the Office of Development to notify us of your intention to make a gift of securities or mutual funds; we can make the process as simple as possible. To facilitate the process, please have this information available:

- Name of the stock/mutual fund gifted
- Number of shares
- Designation of the gift
- Approximate date of expected gift

### **Contact us at:**

**The Hope Heart Institute  
c/o Office of Development  
1380 112<sup>th</sup> Ave NE Suite 200  
Bellevue, WA 98004  
Telephone: 425-456-8706  
Fax: 425-456-8701**

*Please notify The Hope Heart Institute as soon as your stock has transferred.*

## **SAMPLE LETTER OF INSTRUCTIONS**

**Dear (your stock broker):**

This letter authorizes you to transfer (number of ) shares of stock in (company) from account number (your account number) in the name of (your name) to Merrill Lynch Account #335-04E28, in the name of The Hope Heart Institute, DTC #5198. The Hope Heart Institute Tax I.D. # 91-1138000  
Sincerely,