

Senior Resource

ASSOCIATION FOUNDATION



Stock Gift Instructions

Thank you for your interest in donating a gift of securities to Senior Resource Association, Inc. Stocks or bonds are transferred to Senior Resource Association via Direct Transfer Certificate (DTC).
EIN – 59-1539957

To transfer securities electronically from an account held at a brokerage firm or financial institution, you must submit instructions to your broker. On the following page, please find a sample instruction letter provided for your convenience.

Senior Resource Association Account Information:

Account Name: Senior Resource Association
DTC #: 0226
Account #: Z40401907
Brokerage Firm: Fidelity
Phone #: 800.343.3548

Please notify Senior Resource Association as soon as you initiate your transfer to ensure that your gift is credited appropriately and helps seniors in accordance to your wishes. Securities are transferred through a clearinghouse and, frequently, donor names are not included in the transmission we receive.

Senior Resource Association Foundation Contact Information:

Robyn Orzel, Executive Director
694 14th Street
Vero Beach, FL 32960
Main: (772) 569-0760, ext. 144
Direct: (772) 469-3144
Email: Rorzel@SRAMail.org

Sample Instructions on following page.

Thank you!

100% of contributions received are retained by the Senior Resource Association, Inc.

The Senior Resource Association (SRA) is a 501(c)(3) non-profit organization. 100% of contributions received are retained by SRA. (Registration# CH2526) A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL-FREE (800-435-7352) WITHIN THE STATE. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL, OR RECOMMENDATION BY THE STATE.

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Sample Instructions:

Date: _____

_____,
(Brokerage Firm/Contact)

I would like to make a gift of securities to Senior Resource Association, Inc. Please transfer ownership of _____ shares of _____ stock from my
(number) (stock name)

_____ account to Senior Resource Association, Inc., using the
(Brokerage Firm Name)
following account information:

Fidelity DTC: 0226

Account #: Z40401907

Account Name: Senior Resource Association, Inc.

Thank you,

_____,
(Name/Signature)