



## DTC Transfer Instruction Sheet for Gifts of Securities

1. Please complete this form and forward it to your financial advisor.
2. Beverly Bootstraps Tax ID: 04-3254507
3. Please also forward of copy of this form to Beverly Bootstraps by email:  
acaffrey@beverlybootstraps.org

If you have any questions, please call Allison Caffrey at (978) 927-1561 x121.

To: \_\_\_\_\_  
Donor's financial advisor

\_\_\_\_\_  
Telephone

\_\_\_\_\_  
Fax

Please use this form as authorization to make a DTC transfer of the securities below from my account to the account of Beverly Bootstraps at Raymond James.

Donor Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Home Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

Name of Security: \_\_\_\_\_

Number of Shares: \_\_\_\_\_

Gift Purpose: \_\_\_\_\_

For gifts of securities made to Beverly Bootstraps, please deliver by DTC to:

Firm Name: Raymond James & Associates  
DTC Participant #: 0725  
FAO: Beverly Bootstraps Community Services  
Account Number: 19895023

Questions may be addressed to Timothy Hannon at The Hamilton Group: 900 Cummings Center, Suite 201U Beverly, MA 01915. Phone Number: 978-279-9100