



## STOCK DONATION PROCEDURE FOR THE DONOR

Thank you very much for your interest in donating stock to Alexandra House, Inc. Please follow the steps outlined here and if you need further assistance, call Tina Bronson at (763) 656-1363.

1. Complete and email or fax the Stock Donation Letter of Intention to Tina Bronson at [tbronson@alexandrahouse.org](mailto:tbronson@alexandrahouse.org) or (763) 576-8113.
2. Transfer the stock: You can transfer stock in three ways: **electronically** (the simplest and fastest way), by mail, or in person.
  - a. To transfer the securities electronically:

Have your bank or broker notify Christopher Sieg at Sieg Wealth Management (LPL) of the electronic transfer. His contact information 763-381-5800 or [christopher.sieg@lpl.com](mailto:christopher.sieg@lpl.com). Provide your bank or broker this information necessary to transfer the securities:

    - LPL Sieg Wealth Management DTC #0075
    - Alexandra House, Inc. Tax ID: #41-1309977
    - Alexandra House, Inc. Account: #5631-9360
  - b. To transfer the certificates by mail:

**DO NOT SIGN** the stock certificates.  
By registered mail, send the stock certificates with the Letter of Intention sent to Alexandra House. Request a signature as proof of receipt.  
In a separate envelope, also by registered mail and requesting proof of receipt, send a signed *Irrevocable Stock or Bond Power* form to Alexandra House to transfer ownership. You need only sign and date this form and enter the number of shares and stock name. **You need not enter the Account Number or your social security number.**
  - c. To hand deliver the securities:

**DO NOT SIGN** the stock certificates.  
Call Tina Bronson at Alexandra House at (763) 656-1363 to arrange a time to deliver the Letter of Intention, the stock certificates, and a signed *Irrevocable Stock or Bond Power* form to Alexandra House.
3. Receive confirmation from the recipient: Once the brokerage firm receives and processes the request, confirmation is provided to Alexandra House. Alexandra House will confirm your contribution/donation. By agency policy, stocks value is determined by averaging the high and low prices for the stock on the date received. Stocks shall be sold as quickly as possible at the fair market value.



**Phone:** 763-780-2332  
**24-Hour Help Line/TTY:** 763-780-2330  
**Fax:** 763-780-9696  
www.alexandrahouse.org

10065 – 3<sup>rd</sup> Street NE  
Blaine, MN 55434

## STOCK DONATION LETTER OF INTENTION

*Please complete this form for all stock donations. If you need further assistance, please call (763) 656-1363.*

Date \_\_\_\_\_

From (please print): \_\_\_\_\_

Donor name(s) \_\_\_\_\_

Address \_\_\_\_\_

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

Telephone \_\_\_\_\_

E-Mail \_\_\_\_\_

To: Alexandra House, Inc.  
Communications Marketing Director  
10065 – 3<sup>rd</sup> Street NE  
Blaine, MN 55434  
Fax: (763) 576-8113

Dear Ms. Bronson:

Please accept our donation of \_\_\_\_\_ shares of \_\_\_\_\_  
(# of shares) (Name of security)

Designated as follows \_\_\_\_\_  
(indicate  Annual Operating,  Hope Gala,  Capital or  other)

I (we) plan to transfer the securities (please check one of the following):

- Electronically
- By mail
- By hand delivery.

Thank you.

\_\_\_\_\_  
Donor signature

\_\_\_\_\_  
Donor signature



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## IRREVOCABLE STOCK OR BOND POWER

For Value Received, the undersigned does (do) hereby sell, assign and transfer to:

Alexandra House, Inc.  
Communications Marketing Director  
10065 – 3<sup>rd</sup> Street NE  
Blaine, MN 55434  
Tax ID: 41-1309977

### IF STOCK, COMPLETE THIS PORTION:

\_\_\_\_\_ Shares of  Common  Preferred stock of \_\_\_\_\_  
(number) (issuer)

represented by Certificate(s) No.(s) \_\_\_\_\_ inclusive, standing in the name of the undersigned on the books of said company.

### IF BONDS, COMPLETE THIS PORTION:

\_\_\_\_\_ of bonds of \_\_\_\_\_  
(number) (issuer)

In the principle amount of \$ \_\_\_\_\_ Numbers: \_\_\_\_\_

inclusive, standing in the name of the undersigned on the books of said company.

The undersigned does (do) hereby irrevocably constitute and appoint LPL Prosper Wealth Financial to transfer the said stocks or bond(s) as the case may be, on the books of the said Company, with full power of substitution in the premises.

X \_\_\_\_\_  
Stock or Bondholder's Signature

\_\_\_\_\_  
Date

X \_\_\_\_\_  
Stock or Bondholder's Signature

\_\_\_\_\_  
Date