

**INSTRUCTIONS TO
TRANSFER SECURITIES TO:**

Los Alamos Historical Society

To transfer securities:

Please instruct your current broker / custodian to “DTC” your donation to the Los Alamos Historical Society account at Charles Schwab. Your broker will most likely require you to provide them with a written “LOA” = Letter of Authorization which indicates the name of the security, the number of shares and includes the following delivery instructions:

Los Alamos Historical Society
Schwab Account # 4418-4492
DTC Clearing # 0164, Code 40

Please Note: Due to privacy requirements, we are unable to access donor information through the financial agencies that process your transfer. Please provide us with the following information so that we may properly acknowledge and receipt your gift:

Donor Name (s) – first and last
Donor address/phone
Name of stock and number of shares transferring

Information should be sent to:

Jennifer Bennett Los Alamos Historical Society 505-695-5255 jennifer@losalamoshistory.org

If you need additional help with the delivery process you can contact Eric Loucks at LANB

ericl@lanb.com

505-661-2250