

# Transfer Instructions

DEF is pleased to accept gifts of stocks and securities. Please use the attached Discovery Eye Foundation (DEF) Transfer Instruction Letter in order to facilitate your gift. You may use it to send directly to your broker or bank trust officer with your gifting instructions.

*Please send or fax a copy of your transfer authorization to DEF at the address below so we may expect your gift.*

FYI –

- The value of your gift is determined by taking the mean of the high and the low value of the security on the day that it is credited to the DEF account **or** the day that the certificate is in the custody of DEF with a gift letter and an executed stock power. If mailed through the U.S. Postal Service, the gift value is established on the date of the postmark.
- The DEF Federal Tax ID Number is 95-4228653.

If you wish to gift a stock certificate rather than have your bank or broker deliver the stock electronically, please have the certificate registered in the name of **Discovery Fund for Eye Research**.

If the certificate is registered in your name, send it to the attention of Jan Seidel at Morton Seidel & Co. Inc. *unsigned*, along with a letter confirming the gift to DEF. Please include the specific purpose of the gift. Send a signed stock power in a **separate envelope**. Stock powers must be signed as the name(s) appear on the stock certificates.

## Delivering or Mailing Certificates

Morton Seidel & Co. Inc.  
8730 Wilshire Blvd Ste 530  
Beverly Hills, Ca 90211  
310-360-7541  
Attn: Joan Seidel

To: \_\_\_\_\_  
Broker or Bank Name & Contact

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

\_\_\_\_\_  
Address

\_\_\_\_\_  
City State Zip Code

Re: Account No. \_\_\_\_\_ Date: \_\_\_\_\_

Please accept this memo as your authorization to make a gift to **Discovery Eye Foundation** (Federal Tax ID Number is 95-4228653) from my referenced account as soon as possible or on \_\_\_\_\_ (specify date).

The specific purpose of my gift is \_\_\_\_\_.

If you need to contact me or have questions regarding these instructions, my number is \_\_\_\_\_.

Please deliver (check applicable boxes):

\_\_\_\_\_ shares/units of \_\_\_\_\_ (specify stock or bond)

Cash in the amount of \$\_\_\_\_\_

*Include my name in the transaction description on the delivery specified above.*

Following are the delivery instructions:

**Electronic Delivery Wire Transfer Instructions**

**DTC Eligible**

DTC # 0574

Crowell Weedon

FBO Morton Seidel & Co. Inc.

Acct #: 872002911

Discovery Eye Foundation

**For Director's Fund**

DTC # 0574

Crowell Weedon

FBO Morton Seidel & Co. Inc.

Benefit: Discovery Eye Foundation Director's Fund

Acct #: 872042101

**Physical Delivery**

Please issue a physical certificate for the gift specified above registered as follows:

**Discovery Fund for Eye Research.** Send the certificate to:

Morton Seidel & Co. Inc.

8730 Wilshire Blvd Ste 530

Beverly Hills, Ca 90211

310-360-7541

Attn: Joan Seidel

*Include a copy of this memo with the stock certificate to Trust company or bank.*

**Mutual Fund Units**

Please gift \_\_\_\_\_ units of \_\_\_\_\_ (mutual fund name).

For re-registration instructions, please contact Joan Seidel at Morton Seidel & Co. Inc., 310-360-7541

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Donor Signature(s)

Date

cc: Susan Lee DeRemer, VP of Development, Discovery Eye Foundation, fax 310-623-1837

Joan Seidel, Seidel Morton & Co. Inc., fax 310-360-7580

Tax ID: 95-4228653