



STOCK TRANSFER FORM

Donation of Appreciated Assets

Greenbelt Land Trust has an account with Roehl & Yi Investment Advisors LLC for gifting securities.

Broker: Charles Schwab

Account Number: 4401-2456

DTC#: 0164

Account Name: Greenbelt Land Trust

GLT Federal Tax ID #: 94-3113836

If your financial manager has any additional information requests related to the transfer, please call Roehl & Yi Investment Advisors at 541-683-2085.

When you make the transfer, please let us know by filling out the form below and sending it to GLT.

You can send this form and any questions to:

Jessica McDonald, Executive Director

(541) 752-9609

jessica@greenbeltlandtrust.org

Please be advised that I/we have transferred stock to the Greenbelt Land Trust:

DONOR INFORMATION

Name of Donor(s) _____

Address _____

City _____ State _____ Zip _____

Phone _____ Email Address _____

Broker Name/Company _____

Name of Stock _____

Number of Shares _____ Approx. Total Value _____

Estimated Transfer Date _____

THANK YOU FOR SAVING OUR LANDS AND WATERS!