



# California Institute of Integral Studies

## DTC TRANSFER INSTRUCTION SHEET

### IMPORTANT

**1** Please complete this form and forward it to your financial advisor.

**2** Please also forward a copy of this form to the CIIS Development Office via cwilmoth@ciis.edu, as donor information does not always transmit through the DTC wiring system.

If you have any questions, please contact Charles Wilmoth, Interim Director of Development, CIIS, at (415) 575-6269 or via email at cwilmoth@ciis.edu.

TO (DONOR'S FINANCIAL ADVISOR)

TELEPHONE

FAX

Please use this form as authorization to transfer the securities listed below from my account to Cetera Investment Services LLC as my gift to **California Institute of Integral Studies (CIIS), Tax ID # 94-2254303**

FROM (DONOR NAME)

ADDRESS

TELEPHONE

EMAIL OR FAX

NAME OF SECURITY

NUMBER OF SHARES

GIFT PURPOSE

WHO, IN ADDITION TO THE LEGAL DONOR, SHOULD RECEIVE RECOGNITION FOR THIS GIFT?

SIGNATURE(S)

DATE

### DTC Transfer Instructions for Financial Advisors

For gifts of securities to CIIS, please deliver by DTC to:

Cetera Investment Services LLC  
Delivery to DTC Clearing  
Receiving from DTC 0701  
California Institute of Integral Studies  
Account 2XN15082  
Stock Gift  
*(must be noted when affecting transfer)*

### IMPORTANT

For proper donor recognition, transfer must include the following information:

- Donor's name and address
- Name of security & number of shares
- Purpose of gift
- If applicable, additional names for joint recognition