**Sample Letter to Broker**

Dear:

I would like to make a gift of stock on [insert date] to the National Association of Investors (NAIC / BetterInvesting). Please transfer *[number]* shares of *[company name]* to the charity on *[indicate month, year when you would like transfer to occur].*

Use the following transfer instructions:

E\*TRADE from Morgan Stanley

**DTC Number**: 0015

**Account name**: National Association of Investors Corp.

**For Account Number**: 771 629490

It is important to notify NAIC/BetterInvesting of the gift being transferred. Contact information is as follows:

**NAIC/BetterInvesting   
Donation Processing**  
570 Kirts Blvd. Suite 237

Troy, MI 48084  
**E-mail:**KZendel@betterinvesting.org  
**Phone:** 877-275-6242

The National Association of Investors/ BetterInvesting will also provide me with a receipt for this gift.

Thank you for your prompt attention to this matter.

Sincerely,

cc: NAIC / BetterInvesting