



(216) 342-4417 • beinmotion.org
23905 Mercantile Road, Beachwood, OH 44122

Security Transfer Instructions & Notification

This notification document of a pending stock transfer provides expedited gift receipt and acknowledgement to the donor. Please email this completed form to Deborah Holland (dholland@beinmotion.org). Additional questions can be directed to 216-342-4966.

The donor/broker is responsible for initiating the stock transfer to our designated broker.

Agency: Fidelity
Client Account Name: InMotion
DTC #: 0226
For Credit to Acct: Z40203314
Contact Information: Amber Smith, 800-544-5315, ext. 12140

Donor Information (completed by donor)

Name: _____
Address: _____
Telephone: _____
Gift Designation: _____

Transferring Broker Information (completed by transferring broker)

**If additional lines are needed, please use multiple pages.*

Broker Name/DTC #: _____
Contact Name: _____
Phone Number: _____ Email Address: _____
Security Name: _____
Total # Shares: _____ Transfer Date: _____
Ticker/CUSIP#: _____