



(216) 342-4417 • [beinmotion.org](http://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](mailto: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, 817-310-3656, 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#: \_\_\_\_\_