



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 Wendy Voelker at wvoelker@beinmotion.org. Additional questions can be directed to 216-342-4016.

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, x12140

DONOR INFORMATION (TO BE COMPLETED BY DONOR):

Name _____

Address _____

Phone _____

Email Address _____

Gift Designation/Purpose _____

TRANSFERRING BROKER INFORMATION (COMPLETED BY TRANSFERRING BROKER)

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

Broker Name/DTC# _____

Contact Name _____

Phone _____

Email Address _____

Security Name _____

Total # Shares _____

Transfer Date _____

Ticker/CUSIP# _____