



Instructions for Donating Securities

If brokerage firm is holding the securities, do the following:

1. Call and request the brokerage firm to transfer the securities to SecureFutures Foundation, Inc. The brokerage firm may require you to fill out one of their forms or ask you to fax your request; this is up to the individual brokerage firm.
2. Please indicate the stock, quantity, and your account number to the brokerage firm.
3. The securities should be endorsed to BMO Harris brokerage account via LPL Financial.
4. Have the brokerage firm transfer securities to:

BMO Harris – DTC# 0075
For Further Credit to SecureFutures Foundation, Inc.
Account #1077-1768

Donated By _____ *(Donors Name)*

5. Please note that SecureFutures is not notified when a donation is made. We greatly appreciate your help in providing the date of your donation. Please notify development director, Annmarie Baumgartner at annmarie@securefutures.org of your stock donation in order to receive acknowledgement of this gift.

For additional information please contact:

Matthew Flowers, CRPC
Investment Representative | Brokerage, Personal Investment Centre
BMO Harris Financial Advisors, Inc.
235 N Executive Drive | Brookfield, WI 53005
Phone: [262-827-3995](tel:262-827-3995) | Toll Free [800-981-7331](tel:800-981-7331) x8207
matthew.flowers@bmo.com

Thank you for supporting SecureFutures and teen financial capability!