

Giving Securities to The Mountain Retreat & Learning Center, Inc.

Phone (828)526-5838 Fax (828)-526-4505

Taxpayer ID Number **58-1396972**

There are two ways you can transfer securities to The Mountain Retreat & Learning Center, Inc. The easiest way is to use the DTC (Depository Trust Clearing) system to initiate a stock transfer. However, if you have the stock certificate(s) on hand, it may be more convenient to transfer the securities via the mail. Either way, please notify development@themountainrlc.org of your gift.

The instructions for both processes are listed below. Please follow the instructions exactly. If you have any questions, please call The Mountain and ask to speak with the Finance Department.

FOR TDC STOCK TRANSFERS:

Please give a letter of authorization to transfer stock/securities to your broker that includes the following information:

Transfer _____ shares
from my account # _____
in the name of _____

To: DTC#0188, TD Ameritrade

FBO The Mountain Retreat & Learning Center, Inc.

Account Number 430178686

Please bring this letter to your broker/bank and ask them for a MEDALLION GUARANTEE. Once you obtain the Medallion Guarantee, forward the original letter to your broker.

If you or your broker has any questions about initiating this transfer, please contact TD Ameritrade customer service at 800-669-3900 and a representative will assist you.

MAILING SECURITIES TO TD AMERITRADE

Please complete a "Letter of Relinquishment" - see form on page 2 of this document.

Sign the back of the certificate(s) using the exact name as registered on the front.

Print **TD Ameritrade** in the blank space before the words Attorney To Transfer.

Please send via Certified Mail, FEDEX or UPS to TD Ameritrade, PO Box 2760, Omaha, NE 68172-9829.

Please contact our Finance Department finance@themountainrlc.org / extension 221 when you know the exact transfer date so that we can monitor the transaction. We thank you for your support.

RELINQUISHMENT LETTER

To:

TD Ameritrade
PO Box 2760
Omaha, NE 68172

I, _____ am handing you herewith:
_____ shares of _____ stock registered in my
name with the request that you apply this security to the account of:

The Mountain Retreat & Learning Center, Inc., Ameritrade Account # 430178686.

I hereby confirm that I relinquish ownership of these securities to the above referenced
brokerage account owners.

Very truly yours,
