

GLADSTONE

Stocks/Securities Gift Form

Name: _____
Address: _____
City/State: _____
Zip/Postal Code: _____ Country: _____

Please mail form to:
Shaundra Bason
The J. David Gladstone Institutes
1650 Owens Street
San Francisco, CA 94158

Donation of Stock Via Electronic Transfer:

You may transfer stock to Gladstone as a charitable donation using the following information:

- Gladstone's broker is Fidelity Brokerage Services
- Gladstone's Account Rep at Fidelity is Steve Sledge
- Steve's telephone number is (800) 544-5704, Team #206
- Fidelity's DCT is 0226
- Gladstone's account # is: X14-310930

Be sure not to sell appreciated stock and transfer the cash proceeds to Gladstone since you will not be eligible to avoid capital gains tax on the appreciated portion of the stock.

Securities Gifted:

Date of Transfer _____

- 1) Number of Shares: _____ Name of Security: _____
2) Number of Shares: _____ Name of Security: _____

Approximate Intended Date of Transfer _____

Approximate Dollar Value of Gift \$ _____

I would like to support:

- Research where the impact is greatest
 Heart Disease Research
 Alzheimer's Disease Research
 Research in HIV/AIDS
 Other _____

Transferring Broker:

Name: _____
Firm: _____
Telephone: _____

Interested in joining our mailing list?

- Yes, please send me the monthly e-newsletter to _____ @ _____
 Yes, please send me the seasonal Focus magazine.

Signature _____

Date _____