



525 East Cotati Avenue, Cotati, California 94931 T 707.795.2533 F 707.795.7280

## Stock and Securities Transfers

The Animal Legal Defense Fund maintains an investment account with RBC Wealth Management. This account can be used to facilitate the transfer of various financial assets (equities, bonds, etc.). To initiate such a transfer a donor will need the following information:

**ALDF Broker:** Josh Levine, Senior Vice President  
**Broker Contact:** [Joshua.levine@rbc.com](mailto:Joshua.levine@rbc.com), 408.947.3311  
**Client Name:** Animal Legal Defense Fund  
**Brokerage:** RBC Wealth Management  
**Broker Address:** 99 Almaden Blvd. Suite 300 San Jose, CA 95113  
**DTC Number:** 0235  
**Account Number:** 313-89156

If such a contribution is either being considered or forthcoming, we would ask that you send either a letter of intent, copy of your broker instructions, **or** provide the following information via email:

- Type of stock
- Transfer Date
- Number of shares
- Estimated Value

Information can be provided via email to [stock@aldf.org](mailto:stock@aldf.org).

This will allow our organization to identify the benefactor and to send a timely acknowledgement letter. The gift will be sold immediately, and the value of the gift will be the average of the high and low price of the security on the date of the gift according to IRS regulations.

If your security is held in certificate form, you can send the certificate directly to the Animal Legal Defense Fund with a stock power, which needs to be guaranteed (not merely notarized) at your bank or brokerage. The certificate and stock power should be mailed in separate envelopes to the Animal Legal Defense Fund.

Please do not hesitate to contact by phone at 707-795-2533 x1011 or by email at [stock@aldf.org](mailto:stock@aldf.org) if you have any questions or need further assistance. We thank you and your client for supporting the Animal Legal Defense Fund.

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