



## 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 Brokers:** Liza McCartney, CFP  
Dustin Poretskin, CFP

**Broker Contacts:** [liza.mccartney@rbc.com](mailto:liza.mccartney@rbc.com), 954-906-5488  
[dustin.poretskin@rbc.com](mailto:dustin.poretskin@rbc.com), 979-410-3402

**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 request that you send either a letter of intent, copy of your broker instructions, **or** provide the following information via email to [stock@aldf.org](mailto:stock@aldf.org):

- Type of stock
- Transfer date
- Number of shares
- Estimated value

This will allow our organization to identify the benefactor and to send an acknowledgement letter.

If the security is held in certificate form, please 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.

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.