



Insight Retreat Center

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Stock Transfer Instructions

Step 1:

Instruct your stock broker or stock plan administrator to transfer your shares to Insight Meditation Center's account at Schwab. Your broker will need the DTC number and account number for the Insight Meditation Center account.

Transfer the stock to:

Charles Schwab

DTC# 0164

account # 1118-0555 (Insight Meditation Center)

Tax ID # 77-0450217

Step 2:

Notify the Insight Retreat Center (IRC) treasurer that the stock has been transferred.

Email the following information to: treasurer.irc@gmail.com or call (831) 440-8858

Name: _____

Address: _____

Phone (s): _____

I transferred _____ shares of _____

Date of transfer _____ Estimated Value _____

Please apply my donation to the **Insight Retreat Center**.

Step 3:

Some brokers transfer the stock the same day you request it, others may take a few days. The IRC Treasurer will watch for the stock to appear in IRC's account so that it can be sold promptly.

The value of your contribution will be based on the average of the high and low prices of the stock on the date that the stock is received into IRC's account.

If there are any questions, please contact IRC's Treasurer: treasurer.irc@gmail.com.

Thank you for your generosity!