

Sample Letter to Broker

Dear:

I would like to make a gift of stock on _____ (*insert month/day/year*)
to Halo House Foundation.

Please transfer _____ (*number*) shares of _____
(*company name*) to the charity on _____ (*indicate month,*
year when you would like transfer to occur).

Use the following transfer instructions:

Transfer to:

TD Ameritrade
DTC Number: 0188
Account Name: Halo House Foundation
ACCT Number: 936-003152

It is important to notify Halo House Foundation of the gift being transferred. Contact information is as follows:

Halo House Foundation (Tax I.D. Number 27-1220705)
4010 Blue Bonnet Blvd, Suite #110
Houston, TX 77025

E-mail: mail@halohousefoundation.org
Phone: (713) 665-8852
Fax: (713) 391-8365

Halo House Foundation will also provide me with a receipt for this gift.

Thank you for your prompt attention to this matter.

Sincerely,

cc: Halo House Foundation