

# LETTER OF INSTRUCTIONS

Use this form to transfer your securities.

The original complete form and any certificates must be mailed to:  
ClearTrust, LLC 16540 Pointe Village Dr, Ste 210, Lutz, FL 33558



## SECURITY DETAILS: Tell us what security you want to transfer or move.

Issuer name:	Stock class/security type:	Amount to transfer:
The shares are: (select <u>all</u> that apply) <input type="checkbox"/> Book Entry <input type="checkbox"/> Certificated <input type="checkbox"/> Lost <input type="checkbox"/> Restricted <input type="checkbox"/> Unrestricted		

## TRANSFER INSTRUCTIONS: (select one) If this section is not completed, all qualified transfers will be treated as gifts as of the effective date.

- ☐ Cancel/retire the securities back to the issuer. (Skip New Owner's Information section.)
- ☐ Change the registration name. There is no change in beneficial ownership.
- ☐ Deposit unrestricted securities into the current owner's brokerage account. (Skip New Owner's Information section.)
- ☐ The securities were ☐ sold, ☐ gifted, or ☐ inherited on \_\_\_\_\_. The sale/gift price is \$\_\_\_\_\_ per share.

## DELIVERY INSTRUCTIONS: (select one) Statements will be emailed. If no email is provided, it will be mailed to the address of record.

- ☐ Send an account statement. ☐ The broker will initiate a ☐ DRS or ☐ DWAC deposit. ☐ See special instructions below:

NOTE: DRS and DWAC are only available for eligible securities. Please confirm with your broker which option should be used.

## CURRENT OWNER'S INFORMATION: Must match exactly what appears on the certificate or account statement.

Current registration name:	
_____ _____ _____	
Primary EIN/SSN:	Joint SSN (if applicable):
Phone:	
Email:	
Address:	
_____ _____ _____	

## NEW OWNER'S INFORMATION: If multiple, attach a list detailing each new owner's information and amount to transfer.

New registration name:	
_____ _____ _____	
Primary EIN/SSN:	Joint SSN (if applicable):
Phone:	
Email:	
Address:	
_____ _____ _____	

## SIGNATURE(S): This section must be signed by all current owners for a transfer to be executed.

Current owner signature:	Date:
	Reserved for Medallion Guarantee Stamp & Guarantor's Signature
Printed name (and title if applicable):	
Joint owner signature:	
Printed joint name (and title if applicable):	

NOTE: A Medallion Signature Guarantee Stamp ("MSG") is required any time the registration name changes, and the original form must be mailed to ClearTrust, LLC. The MSGS must be provided by an Eligible Financial Institution or member of a registered National Securities Exchange approved by the Securities Transfer Association, Inc. pursuant to Securities and Exchange Commission Rule 17Ad-15. No other form of signature guarantee will be accepted.