



# SAMARITAN HOUSE

## Stock Gift Transfer Instructions

Account Name: Samaritan House  
Financial Institution: National Financial Services, LLC (Fidelity Investments)  
DTC Number: 0226  
Account Number: 657-809387

Contact: David Neeve, CFP®  
One Wealth Advisors  
766 Valencia Street, 2<sup>nd</sup> Floor  
San Francisco, CA 94110  
Phone: 415-617-1023  
Email: [dneeeve@onewealth.net](mailto:dneeeve@onewealth.net)

Samaritan House Federal Tax ID # 23-7416272  
Samaritan House is a Non-Profit, 501(c)(3), Tax-exempt organization under IRS rules

**IMPORTANT NOTICE TO BROKERS:** On the DTC form, please notate the donor name and address, date of transfer; number of shares and name of company. **If possible, please send an email or fax to the Samaritan House contact below with this information. This will enable timely follow-up and acknowledgment of the gift.**

Thank you for considering Samaritan House for your stock donation.

Contact: Jolie A. Bou  
Chief Financial Officer  
Direct line: (650) 523-0810  
Fax: (650) 523-0835  
Email: [jbou@samaritanhousesanmateo.org](mailto:jbou@samaritanhousesanmateo.org)