



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, 2nd Floor
San Francisco, CA 94110
Phone: 415-617-1023
Email: dneeve@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: Inessa Shishmanyman
Chief Financial Officer
Direct line: (650) 523-0810
Email: ishishmanyman@samaritanhousesanmateo.org