



Instructions for giving stock and mutual funds to World Team

STEP 1: Initiate the Transfer with Your Advisor or Broker

To electronically transfer stock or mutual funds, contact your financial institution and provide the information below:

Deliver all DTC Eligible Securities to:

DTC Number: 0164, Code 40
Firm Name: Charles Schwab
Account Name: World Team, Inc.
Account Number: 5763-2664
World Team's EIN: 59-1759927

STEP 2: Notify World Team of Your Transfer

Please complete the form on the second page of this document and send to World Team via, email, mail, or fax.

Email to: us.development@worldteam.org (Director of Development)
(Email transmissions are not secure)

Mail to:
World Team, USA
Attn.: Director of Development
1431 Stuckert Rd.
Warrington, PA 18976

Phone: 1 (800) 967-7109 ext. 80
1 (215) 491-4900 ext. 44
Fax: 1 (215) 491-4910

STEP 3: Confirm Your Transfer

Transfers must be initiated by your financial advisor or broker. Please confirm with your advisor or broker that your gift has been transferred from your account to World Team. Thank you.

Letter of Intent (LOI)

Please accept this letter as my intent to irrevocably transfer a portion of the positions from my financial institution to World Team. I understand that I must initiate this transfer with my advisor or broker. If you have any questions, or if there is a problem with my transfer, please contact me immediately at the phone number listed below. This gift is being contributed by the following individuals/entities/trusts:

Giver Name(s): _____

Email Address: _____ Phone number: _____

Address: _____

Name of Delivering Broker: _____

Anticipated Date of Transfer: _____

Please deliver these shares to the following broker:

__ Via DTC # 0164 to Charles Schwab Acct# 5763-2664

I/we wish to transfer the following assets:

__ Stocks, mutual funds, or publicly traded assets listed below:

Name of security: _____ Symbol: _____ Exact # of shares: _____

Name of security: _____ Symbol: _____ Exact # of shares: _____

Name of security: _____ Symbol: _____ Exact # of shares: _____

Signatures:

Giver 1: Full name (please print) _____

Signature: _____ Date: _____

Giver 2: Full name (please print) _____

Signature: _____ Date: _____