

Clinical Immunology Society  
Foundation



**Stock Transfer Form**

**Donor Information (please print or type)**

Donor's Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Email: \_\_\_\_\_ Phone Number: (\_\_\_\_) \_\_\_\_\_

**Broker Information (please print or type)**

Broker's Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Email: \_\_\_\_\_ Phone Number: (\_\_\_\_) \_\_\_\_\_

**Stock Transfer Information (please print or type)**

Please transfer the listed stocks from my account to the CIS Foundation's custodian, Merrill Lynch.

Name of Stock	Number of Shares	Date of Transfer	Value at Transfer

Authorized Signature (Donor) \_\_\_\_\_ Date \_\_\_\_\_

Authorized Signature (Donor, Joint Owner) \_\_\_\_\_ Date \_\_\_\_\_

**Please return Stock Transfer Form to:**

CIS Foundation  
555 East Wells Street, Suite 1100  
Milwaukee, WI 53202  
(P): (414) 224-8095 (F): (414) 272-6070  
<https://clinimmsoc.org/CIS/About/Foundation.htm>

**For questions, your broker should contact:**

Merrill Lynch

Claudia Denton

Wealth Management Advisor

101 California Street, Suite 2575

San Francisco, CA 94111

(P): (415) 274-6038 (F): (415) 644-5511

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