

# Kwan Um School of Zen

## Form for Transfer of Securities to the Kwan Um School of Zen

\_\_\_\_\_ (name of your investment advisor)  
\_\_\_\_\_ (name of investment firm)  
\_\_\_\_\_ (telephone number for your advisor)  
\_\_\_\_\_ (address of your advisor)  
\_\_\_\_\_

Dear \_\_\_\_\_ (advisor name),

Please accept this letter as your authorization to irrevocably transfer

\_\_\_\_\_ shares  
of \_\_\_\_\_ (asset name)  
from my \_\_\_\_\_ account to:

the Kwan Um School of Zen. The organization's account information is on the next page.

Sincerely,

\_\_\_\_\_ (your name)  
\_\_\_\_\_ (your signature)  
\_\_\_\_\_ (your address)  
\_\_\_\_\_  
\_\_\_\_\_ (your phone)  
\_\_\_\_\_ (your social security number)  
\_\_\_\_\_ (today's date)

To complete the transfer, you will need the Merrill Lynch account information for the Kwan Um School of Zen. Please contact the Director of the Kwan Um School of Zen at [director@kwanumzen.org](mailto:director@kwanumzen.org) for this information.

Jane Dobisz is the Merrill Lynch investment advisor for the Kwan Um School of Zen. Please notify Ms. Dobisz at 800-201-8517 when the transfer is initiated.

Also, please notify the Kwan Um School of Zen when the transfer is initiated:

Director, Kwan Um School of Zen  
99 Pound Road  
Cumberland RI 02864

Phone 401-658-1476  
Fax 401-658-1188  
E-mail: [director@kwanumzen.org](mailto:director@kwanumzen.org)

Thank you for your generosity!

Once the transfer is complete, we will mail a letter acknowledging the donation.