



GIFTS OF SECURITIES Instructions and Contacts

The Development Office is pleased to help facilitate gifts of securities to Green Dot etc., Inc. These may include stock, bonds, or mutual funds (including disbursements from IRAs for individuals over 70 ½ years of age).

Broker-Assisted Electronic Transfers

The easiest, fastest, and safest way to gift appreciated securities held in “street name” for you by a broker or bank is by electronic transfer.

This requires a letter from the donor(s) to the broker or bank that:

1. Identifies the shares (either a specific number or a target dollar total) to be transferred to “Green Dot etc., Inc.”
2. Explains how Green Dot should allocate the gift, i.e. general operations, scholarship support, research and development and whether the gift is restricted or unrestricted
3. Provides all information below on Green Dot’s brokerage account.

Sign the letter with your legal signature(s), and communicate your intention to Green Dot’s Development Office by emailing, mailing or faxing copies of the letter, or by telephone or email to Craig Stapert.

Green Dot Development Office

Craig Stapert
Director of Development
Green Dot etc., Inc.
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Alexandria, VA 22314-5402
Telephone: 571-319-0354
Email: stapert@livethegreendot.com

Green Dot & Broker Contacts

Kimberly Robinson
Director of Operations
571-319-0354
robinson@livethegreendot.com
Mark Henderson
LPL Financial/Hamburg Financial Group
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Telephone: 606-451-0393

Contact one of these individuals who will provide further account information for your transaction.