



TRANSFER INSTRUCTIONS FORM

\*\*Please complete this entire form. Laws have changed and all of this information will be required to be provided as of January 1, 2011. If the information is not provided, after January, 2011, the transfer request may be rejected\*\*

Company Name & CUSIP No. \_\_\_\_\_

Transfer Instructions

Certificate # being transferred: \_\_\_\_\_ Total Number of Shares: \_\_\_\_\_

Current Holder(s) \_\_\_\_\_

Address of Current Owner(s) \_\_\_\_\_

EIN or SSN of Each Current Holder \_\_\_\_\_

This certificate is made up of the following tax lots:

# of shares \_\_\_\_\_ were acquired on (date) \_\_\_\_\_ at a cost basis of \$ \_\_\_\_\_

# of shares \_\_\_\_\_ were acquired on (date) \_\_\_\_\_ at a cost basis of \$ \_\_\_\_\_

# of shares \_\_\_\_\_ were acquired on (date) \_\_\_\_\_ at a cost basis of \$ \_\_\_\_\_

NEW REGISTRATION REQUEST

If transferor does not specify which lots are to be transferred to whom, the FIFO method or equal division may be used by the transfer agent. In the case of inheritance transfer, shares will be equally divided among recipients unless otherwise instructed by estate representative. If no cost basis is provided, transfer is assumed to be a gift and the fair market value will be reported in accompanying statements.

\*\*\* Transfer Agent is requires, by law ,to pass through cost basis information to all "applicable persons", under Cost Basis Reporting, signed into law through the Emergency Economic Stabilization Act of 2008.

New Shareholder Registration \_\_\_\_\_

New Address(s) \_\_\_\_\_

Total Shares being transferred \_\_\_\_\_

EIN or SSN \_\_\_\_\_

Are these shares a Gift? Y\_\_\_N\_\_\_ Are the recipients inheriting the shares from an estate? Y\_\_\_N\_\_\_

Does this transfer qualify as a wash sale? Y\_\_\_N\_\_\_

If the shares are being Acquired, acquisition Date \_\_\_\_\_ at a cost of \$ \_\_\_\_\_

Print Name: \_\_\_\_\_ Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Medallion Guarantee Stamp Area

For Registration / Ownership changes – The owner of the certificates must have their signature "Medallion Guaranteed" by an approved bank, broker, or other financial institution associated with the medallion program, such as STAMP, SEMP, or MSP