



**Bergen Volunteer Medical Initiative**

To: Donors of Securities to BVMI

From: Edward Gollhofer, Treasurer

Date: July 8, 2024

Thank you so much for thinking of BVMI as you make your gift of securities. We – and our patients – are most grateful for your generosity.

Please request that your financial institution DTC (electronically transfer) the securities you wish to donate to BVMI to our brokerage account as follows:

Name of Financial Institution	Charles Schwab & Co.
DTC #	DTC 0164, Code 40 <b>please include your name and address in the DTC textbox</b>
	For the benefit of Bergen Volunteer Medical Initiative ( <b>Entity</b> )
Schwab Account #	1005-9155

Once you order the transfer, we ask that either you or your broker **immediately advise us** of the particulars of your gift: date, name of securities, number of shares or units donated, estimated value of gift, and the contact information for your financial institution.

Please contact Erica West to advise us of this transfer:

Erica Joy West  
Charitable Investment Counselor  
Phone: 201-518-8487  
Fax: 201-518-8494  
E-mail: [ejwest@bvmi.net](mailto:ejwest@bvmi.net)

Thank you for your generosity. If you have any questions, please do not hesitate to contact me at [ejg271@gmail.com](mailto:ejg271@gmail.com)