

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

Theresa E. Chacopulos, CFP, CIMA  
Senior Vice President/Private Client Advisor  
Well Fargo The Private Bank  
8601 N. Scottsdale Road, Suite 280  
Scottsdale, AZ 85253

Dear Mrs. Chacopulos –

Please accept this letter as my instruction to donate the following mutual funds to the Alliance Defense Fund, Account # W10919044:

Date of Transfer: \_\_\_\_\_

Name of Mutual Funds: \_\_\_\_\_

Number of shares: \_\_\_\_\_

CUSIP number: \_\_\_\_\_

My Account #: \_\_\_\_\_

Brokerage firm: \_\_\_\_\_

Name of my broker: \_\_\_\_\_

Telephone # of my broker: \_\_\_\_\_

If you have any questions, please contact my broker at the number listed above. Thank you for your assistance in making this gift to the Alliance Defense Fund.

Sincerely,

\_\_\_\_\_  
*(please provide signature above)*

Name: \_\_\_\_\_

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

City, State, Zip: \_\_\_\_\_