

# Family Stock Transfer Letter

Subject: Request for Stock Transfer to Family Member

Dear [Transfer Agent/Brokerage Name],

I am writing to request the transfer of my stock holdings to a family member. Please find the details below:

## Transferor Information:

- Name: [Your Full Name]
- Account Number: [Your Account Number]
- Address: [Your Address]

## Transferee Information:

- Name: [Family Member's Full Name]
- Relationship: [Son/Daughter/Spouse/etc.]
- Address: [Family Member's Address]
- Social Security Number: [SSN]

## Stock Transfer Details:

- Company Name: [Company Name]
- Stock Symbol: [Symbol]
- Number of Shares: [Number]
- Certificate Numbers (if applicable): [Certificate Numbers]

This transfer is being made as a gift and I understand any tax implications that may arise. I have enclosed the necessary documentation including signed stock certificates and transfer forms.

Please process this transfer at your earliest convenience and send confirmation to both parties once completed. If you require any additional documentation or have questions, please contact me at [Phone Number] or [Email].

Thank you for your assistance.

Sincerely,

[Your Name]

[Date]

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