

# Mason Investment Advisory Services, Inc.

## HOW TO DELIVER SECURITIES TO YOUR ACCOUNT

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1. Each stock certificate must have a corresponding Irrevocable Stock/Bond Power to accompany it, i.e., if you have twenty-two stock certificates, you will need to sign twenty-two stock/bond powers.
2. The Stock/Bond Power must be signed exactly as the stock certificate has been issued. Examples are (a) stock certificate is issued to Robert H. Smith – stock power must be signed Robert H. Smith; (b) stock certificate is issued to Bobby Smith – stock power must be signed by Bobby Smith.
3. Do not sign or complete the stock/bond power. This form has been pre-printed assigning TD Ameritrade Institutional (which is the clearing firm for Mason Investment Advisory Services, Inc.) as attorney to transfer. (IF THIS BLANK DOES NOT REFLECT “**TD AMERITRADE INSTITUTIONAL**,” STOCK/BOND POWERS AND CERTIFICATES SHOULD BE MAILED IN TWO SEPARATE ENVELOPES)
4. Do not sign or complete the back of the stock certificate. These must be completely blank.
5. On each stock/bond power to each stock certificate, you must put the client’s account number in the upper right hand corner.
6. Staple each stock/bond power to each stock certificate. Please complete the Gift Letter B, keeping a copy for your records and sending another copy to your registered representative. Attach this form to the front of your certificates and powers.
7. We strongly recommend the stock/bond powers and certificates be sent via overnight mail, receipt signature required. This helps prevent loss/theft and ensures immediate attention. Send your stock/bond powers, Gift Letter B and stock certificates to:

*Overnight:*

TD Ameritrade Institutional  
5010 Wateridge Vista Drive  
San Diego, CA 92121-5775

*PO Box:*

TD Ameritrade Institutional  
PO Box 919031  
San Diego, CA 92191-9031

8. Should you need additional information, please do not hesitate to contact Sandy Stransky at Mason Investment Advisory Services, Inc., at (703) 716-6000.