



# How to transfer shares to a new stockholder with Stocktreasury

16 Steps [View on Tango](#)

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Created by

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Creation Date

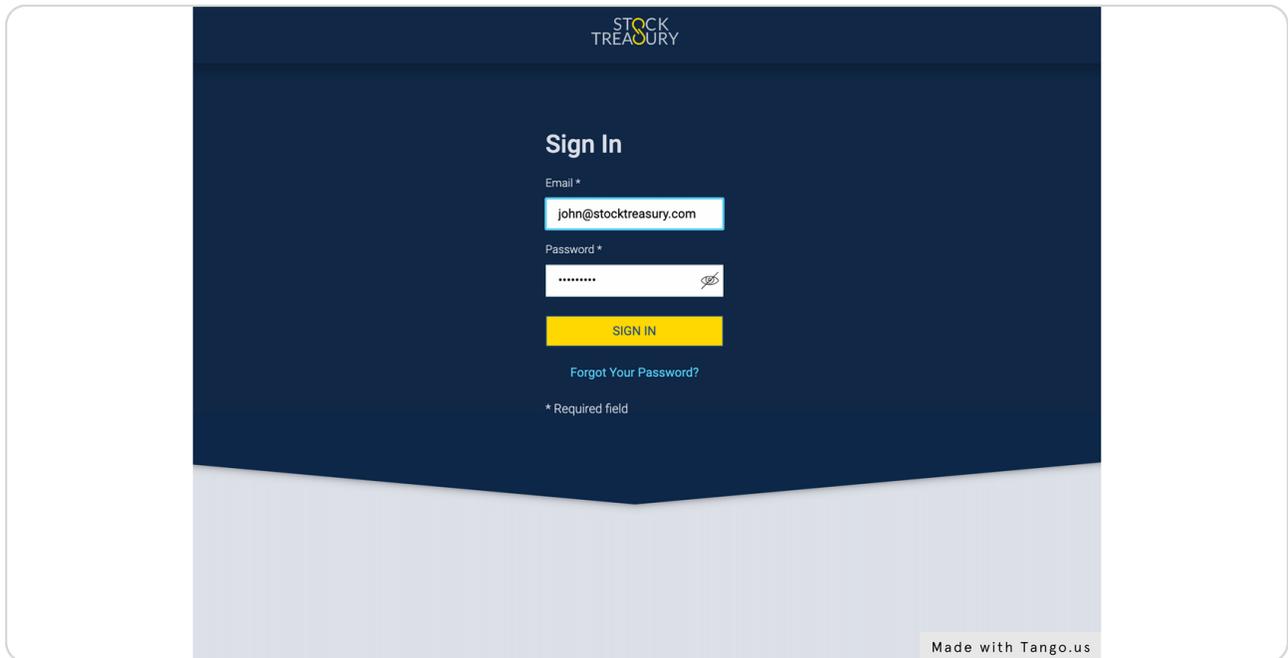
October 23, 2021

Last Updated

October 23, 2021

## STEP 1

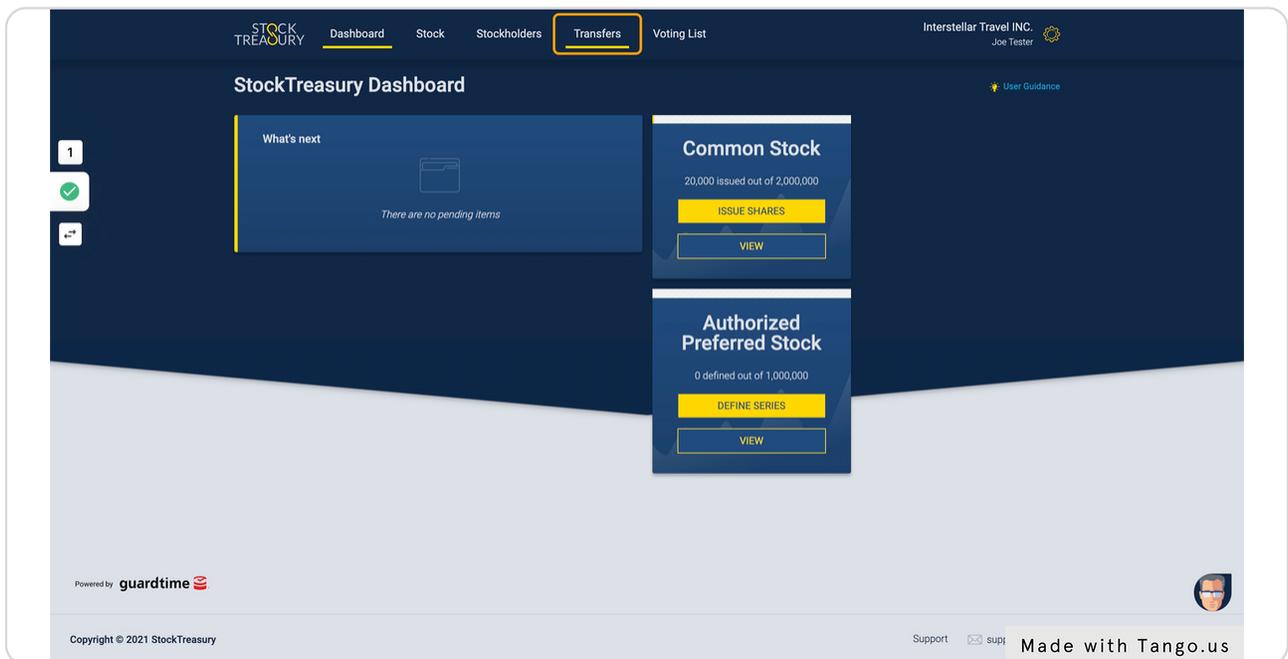
### Log in to StockTreasury | Digital Stock Ledger



The screenshot shows the 'Sign In' page of the StockTreasury application. At the top center is the 'STOCK TREASURY' logo. Below it, the heading 'Sign In' is displayed. There are two input fields: 'Email \*' containing 'john@stocktreasury.com' and 'Password \*' with masked characters. A yellow 'SIGN IN' button is positioned below the password field. A link for 'Forgot Your Password?' is located below the button. A note at the bottom states '\* Required field'. The page is set against a dark blue background with a light grey gradient at the bottom. A 'Made with Tango.us' watermark is visible in the bottom right corner.

## STEP 2

### In the StockTreasury navigation bar in the header, click on the Transfers tab



The screenshot displays the 'StockTreasury Dashboard' for 'Interstellar Travel INC. Joe Tester'. The navigation bar at the top includes 'Dashboard', 'Stock', 'Stockholders', 'Transfers' (highlighted with a yellow box), and 'Voting List'. The main content area features a 'What's next' section with a folder icon and the text 'There are no pending items'. To the right, there are two panels: 'Common Stock' (20,000 issued out of 2,000,000) with 'ISSUE SHARES' and 'VIEW' buttons, and 'Authorized Preferred Stock' (0 defined out of 1,000,000) with 'DEFINE SERIES' and 'VIEW' buttons. The footer contains 'Powered by guardtime', 'Copyright © 2021 StockTreasury', 'Support' with an email icon, and a 'Made with Tango.us' watermark.

### STEP 3

## Click on MAKE NEW TRANSFER

The screenshot shows the 'Transfers' page in the Stock Treasury system. The page title is 'Transfers' and it includes a 'User Guidance' link. Below the title, there is a search bar for 'Name/email/phone #' and a 'MAKE NEW TRANSFER' button highlighted with a yellow box. A table lists existing transfers with columns for 'From (transferor)', 'To (transferee)', '# of shares', 'Amount paid', 'Stock class', and 'Date & time'. The table contains two rows: one for 'Joe Tester' transferring to 'James Adams' and another for 'Original Issue' by 'Joe Tester'. At the bottom, there is a 'Powered by guardtime' logo and a 'Made with Tango.us' watermark.

| From (transferor) | To (transferee) | # of shares | Amount paid | Stock class  | Date & time          | PDF                     | CSV |
|-------------------|-----------------|-------------|-------------|--------------|----------------------|-------------------------|-----|
| Joe Tester        | James Adams     | 4,000       | \$40.00     | Common Stock | Oct 22 2021 04:45 AM | <a href="#">Details</a> |     |
| Original Issue    | Joe Tester      | 20,000      | \$200.00    | Common Stock | Sep 24 2021 05:42 PM | <a href="#">Details</a> |     |

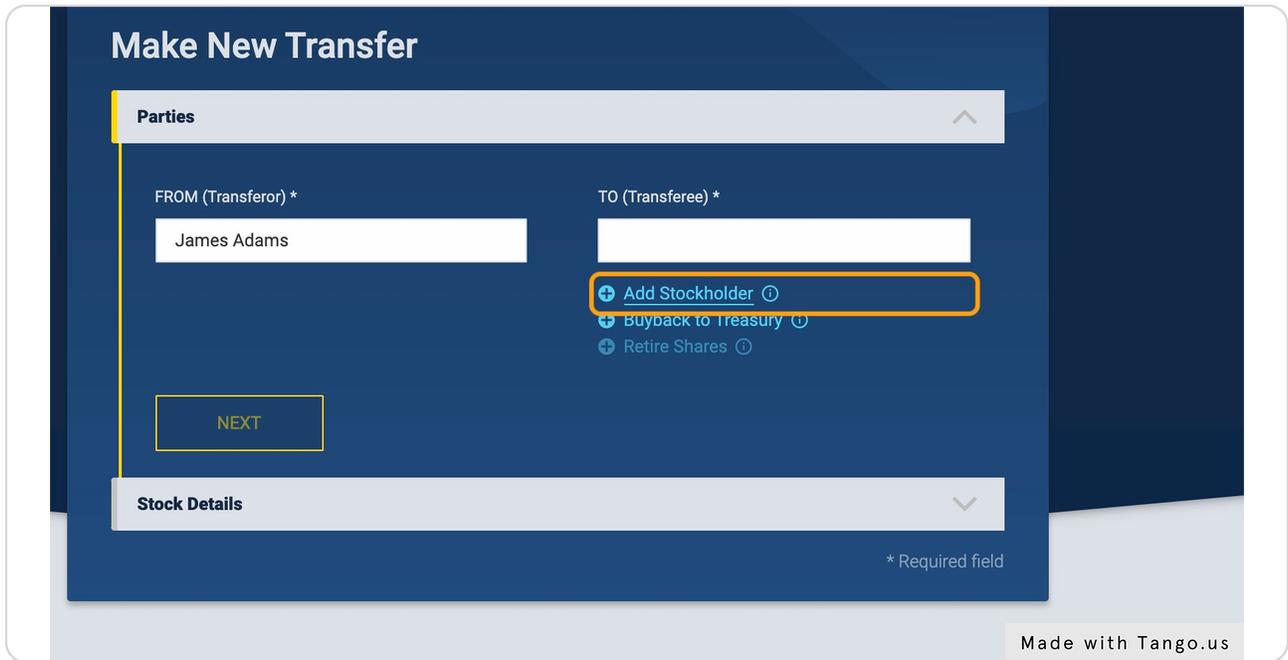
### STEP 4

## Select FROM (transferor) in the dropdown menu

The screenshot shows the 'Make New Transfer' form. The 'Parties' section has two dropdown menus: 'FROM (Transferor) \*' and 'TO (Transferee) \*'. The 'FROM (Transferor) \*' dropdown is open, showing a list of names: 'Joe Tester', 'James Adams', and 'John Estrin'. The 'NEXT' button is highlighted in a yellow box. The 'TO (Transferee) \*' dropdown is closed, showing options: 'Add Stockholder', 'Buyback to Treasury', and 'Retire Shares'. The 'Stock Details' section is collapsed. At the bottom right, there is a '\* Required field' note and a 'Made with Tango.us' watermark.

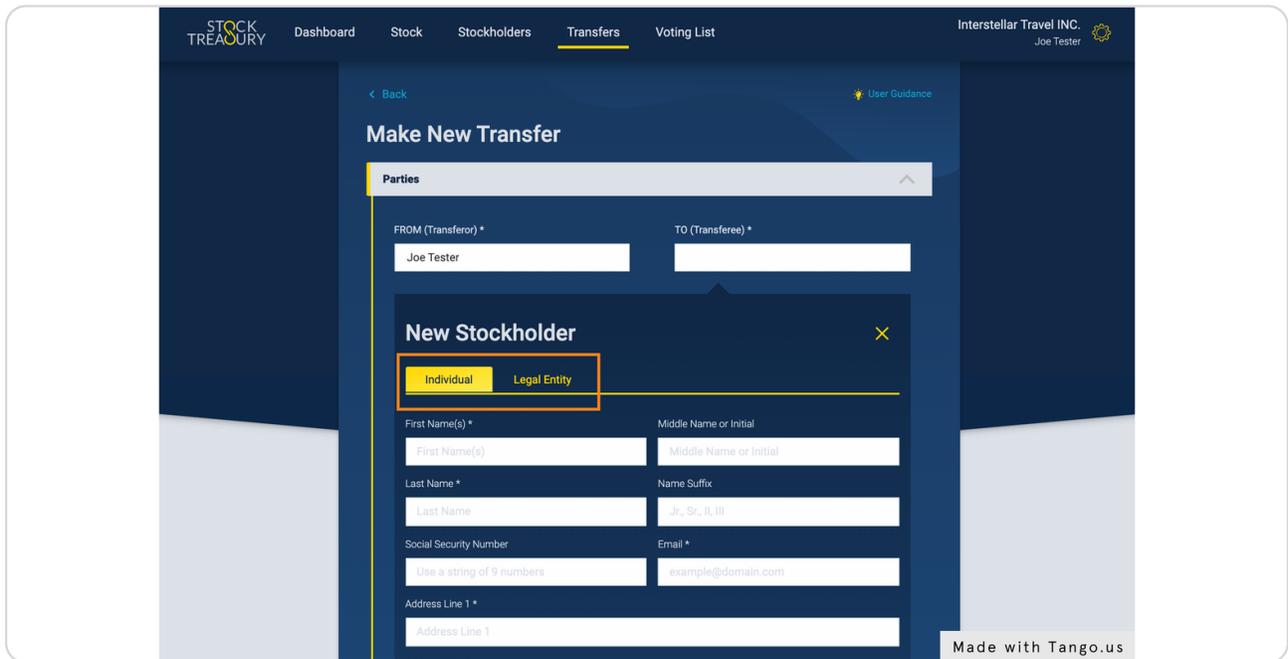
STEP 5

On the TO(transferee) side, click on Add Stockholder



STEP 6

Choose whether the transferee is an individual or a legal entity



STEP 7

Fill in stockholder details and click on SUBMIT

15

✓

15

### New Stockholder

Individual Legal Entity

First Name(s) \* Middle Name or Initial

John Middle Name or Initial

Last Name \* Name Suffix

Estrin Jr.

Social Security Number Email \*

example@domain.com

Address Line 1 \* Address Line 2

66 Main St.

Address Line 2

City \* State \*

Fairfield

ZIP Code \* Country of Residence \*

United States of America

SUBMIT

Stock Details

\* Required field

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STEP 8

The stockholder now appears in the TO (transferee) field. Click on NEXT

STOCK TREASURY Dashboard Stock Stockholders Transfers Voting List Interstellar Travel INC. Joe Tester

18

✓

18

### Make New Transfer

Parties

FROM (Transferor) \* TO (Transferee) \*

John Estrin

Edit Stockholder information

Add Stockholder

Buyback to Treasury

Retire Shares

NEXT

Stock Details

\* Required field

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STEP 9

**Choose stock class and enter all transfer details**

Parties

Stock Details

Stock Class \*

Common Stock

Common Stock

4000 shares available

Date of Transfer \* ⓘ

Oct 22, 2021

Total amount paid \*

\$0

Transfer related documents \* ⓘ

Drop files here to upload or  
**click to choose file**  
(Files up to 50MB)

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STEP 10

**Upload transfer documents such as corporate board resolution, stock purchase agreements etc.**

Parties

Stock Details

Stock Class \*

Common Stock

Common Stock

4000 shares available

Date of Transfer \* ⓘ

Oct 22, 2021

Total amount paid \*

\$0

Transfer related documents \* ⓘ

Drop files here to upload or  
**click to choose file**  
(Files up to 50MB)

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STEP 11

Fill in a legend (restrictions, exemptions, conditions, etc.), if applicable

Stock Class \*  
Common Stock

Date of Transfer \*  
Oct 22, 2021

Number of Shares \*  
1,000

Total amount paid \*  
\$100

Transfer related documents \*  
Drop files here to upload or  
click to choose file  
(Files up to 50MB)

Files  
Board-Resolution.pdf

Legend(s)  
Do not transfer until 2025

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STEP 12

Click on NEXT

27

Parties

Stock Details

Stock Class \*  
Common Stock

Date of Transfer \*  
Oct 22, 2021

Number of Shares \*  
1,000

Total amount paid \*  
\$100

Transfer related documents \*  
Drop files here to upload or  
click to choose file  
(Files up to 50MB)

Files  
Board-Resolution.pdf

Legend(s)  
Do not transfer until 2025

NEXT

\* Required field

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## STEP 13

### Review all stockholder and transfer details and click on RECORD TRANSFER

The screenshot shows a web interface for recording a stock transfer. On the left, there is a sidebar with a notification icon showing '28', a green checkmark, and a minus sign. The main content area is divided into several sections:

- From (transferor):** Individual (redacted), Email (redacted).
- To (transferee):** Individual **John Estrin**, Email (redacted).
- Transfer Recorded By:** **Joe Tester**, Email (redacted).
- Table:**

| Date         | Stock Class  | Number of Shares | Value Received |
|--------------|--------------|------------------|----------------|
| Oct 22, 2021 | Common Stock | 1,000            | \$100.00       |
- Transfer Documents:** [Board-Resolution.pdf](#)
- Legend(s):** Do not transfer until 2025

Below the table, there is a disclaimer: "By pressing the record button, you authorize StockTreasury to execute the transaction on terms and conditions as indicated above." At the bottom, there are two buttons: "RECORD TRANSFER" (highlighted with a yellow border) and "Edit Transfer".

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## STEP 14

### A security code page is displayed in the browser window

The screenshot shows a security code page with a dark blue background. At the top, the logos for "STOCK TREASURY" and "PRIME SIGNER" are displayed. Below the logos, the text reads: "Please make sure the code displayed below matches the code shown on the PrimeSigner authentication app on your mobile device, and authenticate via the app".

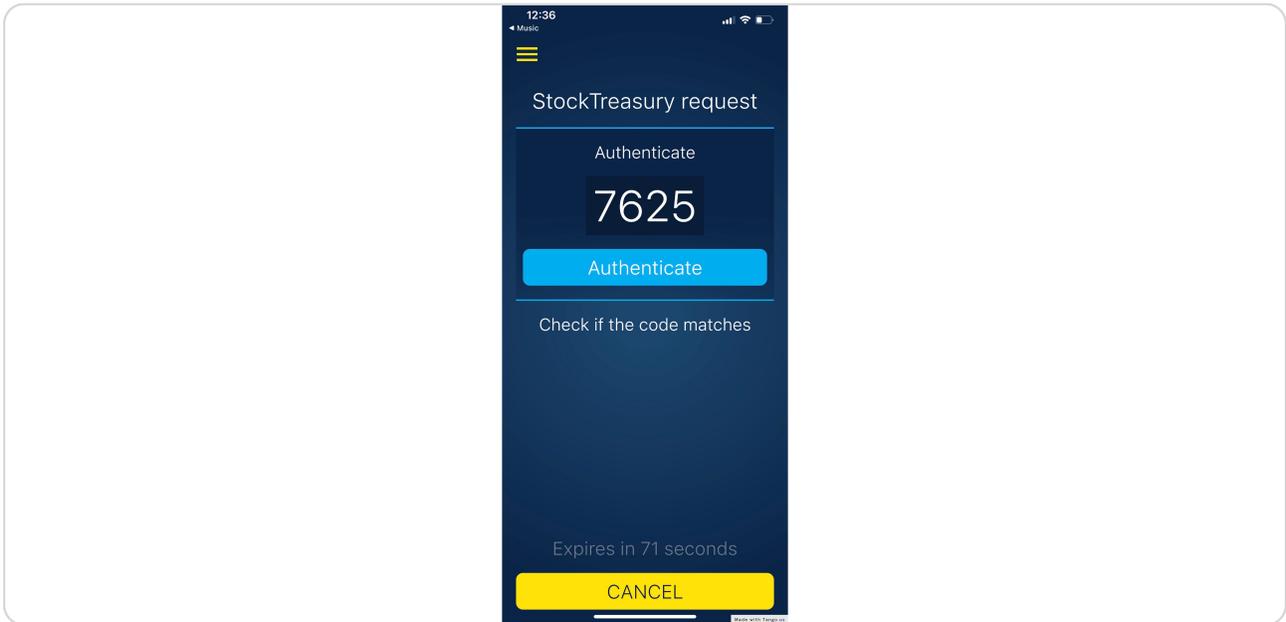
The security code is displayed in a large white box: **7625**

Below the code, there is a "Cancel" button and a link: "Cannot access your StockTreasury account?".

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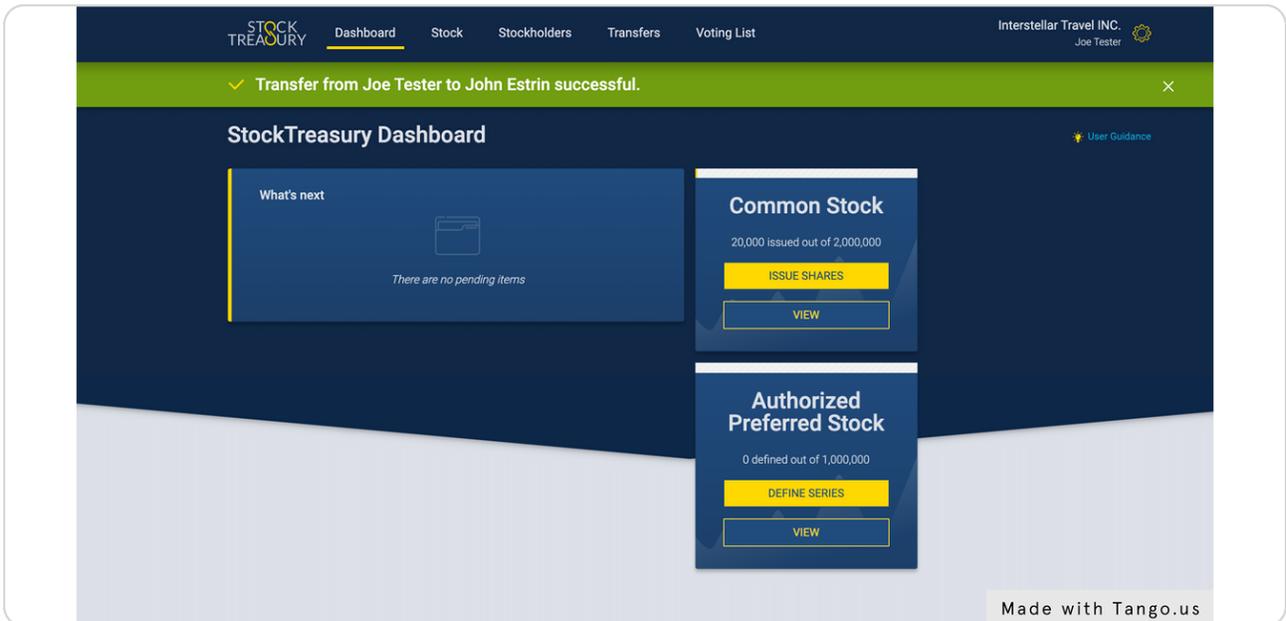
STEP 15

Open the PrimeSigner app on your mobile device and make sure the codes match. Then click on Authenticate



STEP 16

Congratulations! You have successfully transferred shares using StockTreasury



Created in seconds with

*Tango*