



SAN FRANCISCO SYMPHONY

Gifts of Stock Procedures Form

Thank you for your interest in making a gift of stock to the Symphony. **Please complete this form to execute your transfer:**

Donor Name: _____

Transaction Date: ____/____/____

Financial Advisor Name: _____ Financial Advisor Phone #: _____

Stock Name: _____ # of Shares: _____ Approx. Gift Value: \$_____

Donor Signature

Date

Phone Number

1. Mail or fax this form to the San Francisco Symphony.

MAIL: The San Francisco Symphony **FAX:** 415-621-4767
Attention: Development Division
Davies Symphony Hall
San Francisco, CA 94102

2. **Submit a copy of this completed form to your broker.** The Symphony is **not** authorized to execute the transfer of stock on your behalf.
3. **Please provide your financial advisor with the following information** for the Symphony's account with Charles Schwab & Co. The Symphony will use the average of the high and low price of the stock on the day the shares are received in the Symphony's account to value the gift. Please consult your tax advisor for the amount of your charitable deduction.

Account: Charles Schwab & Co.
Account #: 7769-0630 DTC #0164
Address: 100 Post St.
San Francisco, CA 94108
Representative: Josh Bennett
Phone Number: 415-667-6238
Fax: 415-956-2770
SF Symphony Tax ID: 94-1156284

4. **When you have instructed the transfer of stock, please contact Rachel Morris, our Donor Records Analyst, so that we may confirm receipt of your gift and provide a timely acknowledgement letter.**

Rachel Morris, Donor Records Analyst
415-503-5441 phone
415-241-9206 fax
rmorris@sfsymphony.org