



**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  
Attention: Development Division  
Davies Symphony Hall  
San Francisco, CA 94102

**FAX:** 415-621-4767

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  
**SF Symphony Tax ID:** 94-1156284

4. **When you have instructed the transfer of stock, please contact Holly Hobson, so that we may confirm receipt of your gift and provide a timely acknowledgement letter.**

Holly Hobson  
415-503-5432 phone  
415-241-9206 fax  
hhobson@sfsymphony.org