

# THE SAN FRANCISCO FOUNDATION

*The Community Foundation of the Bay Area*

225 BUSH STREET, SUITE 500, SAN FRANCISCO, CA 94104-4224

## **Transfer Instructions for Gifts of Stock**

Please notify The San Francisco Foundation in writing whenever you intend to transfer a gift of securities. The simplest way to do this is to fax to the Foundation a copy of the instructions that you give to your broker. Address this fax to ATTN: Donations at (415) 477-2784. The letter of instruction should include a description of the security (e.g. 50 shares of XYZ Corporation common stock), as well as the name of your Fund at the Foundation.

To facilitate your gift, please transfer securities to the Foundation's brokerage account at Morgan Stanley Dean Witter:

**Morgan Stanley Dean Witter**  
**Attn: Doug Treter**  
**101 California Street, 2<sup>nd</sup> Floor**  
**San Francisco, CA 94111**  
**Phone: (415) 693-6110**  
**FAX: (415) 693-6073**

**Account # 101-523576-408**  
**DTC # 0015**

If you hold the stock certificate you wish to donate, you may either deliver it to the Foundation along with a signed stock power or mail it. Please send the signed stock power under separate cover. Forward to:

**ATTN: Donations**  
**The San Francisco Foundation**  
**225 Bush Street, 5th Floor**  
**San Francisco, CA 94104-4224**

### **Mutual Funds**

Morgan Stanley Dean Witter can handle most mutual fund transactions. However, there are a number of mutual funds that can only be handled directly through the mutual fund firm. These gift transactions will take longer to complete than a standard gift of publicly traded stock or mutual funds. In order to handle your gift as efficiently as possible, please contact Donor Services at 415.733.8500 to confirm the trading status of your mutual fund.

*For general questions about charitable gifts to the Foundation, or for gifts other than stock (e.g. real estate or personal property), please contact Donor Services at 415.733.8500.*

**The Foundation's Tax ID Number is 01-0679337**