



**Mill Valley Schools Community Foundation
Securities Transfer Request Form**

409 Sycamore Avenue, Mill Valley, CA 94941
415-389-7789
415-389-7766 fax

Shares can be transferred directly from your brokerage account to the Kiddo! (Mill Valley Schools Community Foundation) account. Complete the form below and **send a signed copy to your broker. Only your broker can initiate the transfer.** Please check with your broker for additional requirements. Thank you!

Please contact us directly. We do not receive donor information from your broker. ONLY YOU CAN DISCLOSE THAT YOU ARE THE DONOR. To ensure that we are able to acknowledge your donation properly; Fax a copy of this form to Kiddo! at 415-389-7766 or email blamp1@kiddo.org the stock and share quantity **or you can just call Bill, at 415-389-7790 with the information.**

Date: _____

To: _____ (Broker Name)
_____ (Broker Firm)
_____ (Broker Phone Number)

Please accept this letter as your authorization to irrevocably transfer:
(name of stock, number of shares)

Which you hold in the name of:
(account title at brokerage firm)

From my account number:

to the account of the Mill Valley Schools Community Foundation dba Kiddo!

Please transfer via DTC as follows:
Charles Schwab & Co DTC Clearing #0164 code 40
Account number: 6293-4723
Acct Registration:
Mill Valley Schools Community Foundation
FederalTax ID# 94-2848305

If you have any further questions please call Bill Lampl at (415)389-7790 or Drew Pratt at Wetherby Asset Management, 415-399-9159.

Gift Designation (purpose of gift i.e. Annual Campaign, Endowment, etc.)

THANK YOU!