



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

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

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 unless you make that information available. ONLY YOU CAN DISCLOSE THAT YOU ARE THE DONOR.***

*To ensure that we are able to acknowledge your donation properly, contact us one of the following ways: Fax or email a copy of this form to Kiddo! at 415-389-7766 or info@kiddo.org with stock name and shares quantity. You can also call Bill Lampl, Kiddo! Executive Director, at 415-389-7790.*

Date: \_\_\_\_\_

To: \_\_\_\_\_ (Broker Name)  
\_\_\_\_\_ (Broker Firm)  
\_\_\_\_\_ (Broker Phone)

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

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

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From my account number:

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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  
    Federal Tax ID# 94-2848305

If you have any further questions, please contact Nancy Swanson at Innovest (303-694-1900 Ext. 319).

Please include your Gift Designation (purpose of gift eg. Annual Campaign, Endowment, etc.)

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THANK YOU!