



**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:** Mail or email a copy of this form to Kiddo! at the address above or info@kiddo.org with stock name and shares quantity. You can also call Jessica Newman, 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)

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
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 e.g. Annual Campaign, Endowment, etc.)

THANK YOU!