



**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](mailto: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)

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

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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.)

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THANK YOU!