

# DONATED SECURITIES TRANSFER FORM



**INSTRUCTIONS:**

1. Please complete this form and return it to the Los Altos Community Foundation (LACF) by one of the following methods: 1) scanned copy sent to LACF by email, 2) U.S. mail (address below). Note: In order for LACF to acknowledge your generous gift in a timely way, it is important to receive this document *prior* to the transmittal of securities. After receiving this document and the securities have been transferred, LACF will send you a written acknowledgment of your gift for tax purposes and donor recognition within approximately 10 working days. For more information on this process, please call 650.949.5908 or e-mail [lacf@losaltoscf.org](mailto:lacf@losaltoscf.org).
2. This form may also be used to supply your broker with the Los Altos Community Foundation's account information.

Today's Date \_\_\_\_\_

Your Brokerage Firm Name: \_\_\_\_\_

Brokerage Address: \_\_\_\_\_

City / State / Zip: \_\_\_\_\_

Account Number: \_\_\_\_\_

(Where stock is being transferred from)

Direct gift to: \_\_\_\_\_ Unrestricted gift for the Los Altos Community Foundation  
\_\_\_\_\_ Donor Advised Fund at LACF named: \_\_\_\_\_  
\_\_\_\_\_ Other: \_\_\_\_\_

**BROKER:** In reference to the aforementioned account, please deliver via DTC, \_\_\_\_\_ shares of  
(Quantity)  
\_\_\_\_\_ to the Los Altos Community Foundation via:  
(Name of Securities)

Charles Schwab & Co. Inc.  
2423 East Lincoln Drive, Phoenix AZ 85016-1215  
RE: Los Altos Community Foundation  
DTC # 0164 Account # 18863904 TAX ID #: 77-0273721

\_\_\_\_\_  
Donor Name (please print)

\_\_\_\_\_  
Donor Signature

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