

TRANSFER FORM FOR DONATING SECURITIES TO LOS ALTOS COMMUNITY FOUNDATION



INSTRUCTIONS TO DONOR OF SECURITIES:

1. Please complete this form and provide to your broker with the below Los Altos Community Foundation (LACF) account information. Your broker will use the information in this form to transfer your stock to LACF's account.
2. Also, please provide a copy of this filled out form to LACF by one of the following methods: 1) scanned copy sent to LACF by email, 2) fax, or 3) U.S. mail (fax and 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 sell the stock and send you a written acknowledgment of your gift for tax purposes and donor recognition. For more information on this process, please call LACF at 650.949.5908 or email lacf@losaltoscf.org.

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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