



Securities Transfer Information

To ensure a smooth transfer, please complete the sections below and call our Charitable Giving staff at (619) 235-2300.

Date: _____

Donor: _____

Fund Name: _____

Fund #: _____

Approximate Date of Gift: _____

Stock Name and/or Mutual Fund: _____

of Shares: _____

Stock Name and/or Mutual Fund: _____

of Shares: _____

Coming from:

Name of Brokerage Firm: _____

Branch Location: _____

Branch Telephone: _____ **Broker's Name:** _____

Going to SDF:

Name of Brokerage Firm: _____

Branch Location: _____

Branch Telephone: _____ **Broker's Name:** _____