

Thank you for your interest in making a charitable donation to The San Diego Foundation in the form of a Stock Transfer. Please complete and submit the Stock Contribution Form to notify The San Diego Foundation of your gift and to help ensure it is processed accurately. Without the complete information below, we may be unable to accept your gift.

Submit your completed Stock Contribution Form by email to DonorServices@sdfoundation.org or by fax to (619) 239-1710. Or, you can submit this information through our website at SDFoundation.org/StockGift.

For stock held in brokerage accounts, your broker can assist you in making a gift of stock via a direct transfer to The San Diego Foundation.

Information for Your Broker

Depository Trust Company

FBO The Northern Trust Company

Participant Number 2669

Reference Account 44-98583

Your Name

Trust Name, if applicable - required for TSDF to accept gifts from a trust

Your San Diego Foundation Fund Name or Number

Gift of Stock Form

In advance of your gift, please submit the following information to The San Diego Foundation:

First Name* _____ Last Name* _____

San Diego Foundation Fund Name that is receiving the gift* _____

San Diego Foundation Fund Number that is receiving the gift _____

Type of Stock* _____

Number of Shares* _____ Approximate Value _____

The contribution is coming from a(n):* Individual Trust

If the contribution is coming from a Trust, enter the Trust Name _____

Trust Name is required to properly receipt donors for tax purposes.

Broker Name* _____

**Indicates required field.*

The San Diego Foundation team is committed to supporting your philanthropic goals and enhancing our donor services to provide you with the best experience possible. For questions or assistance, please contact our Donor Services Team at (619) 814-1332 or DonorServices@sdfoundation.org.