

# TRANSFER FORM FOR DONATING SECURITIES TO LOS ALTOS • MOUNTAIN VIEW COMMUNITY FOUNDATION



## INSTRUCTIONS TO DONOR OF SECURITIES:

1. Please complete this form and provide to your broker with the below Los Altos Mountain View Community Foundation (Foundation) account information. Your broker will use the information in this form to transfer your stock to Foundation's account.
2. Also, please provide a copy of this filled out form to Foundation by one of the following methods: 1) scanned copy sent to Foundation by email or 2) U.S. mail (address below). Note: In order for us to acknowledge your generous gift in a timely way, it is important that we receive a copy of this document at the same time as the stock donation. After receiving this document and the securities have been transferred, we 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 us at (650) 949-5908 or email [info@lamvcf.org](mailto:info@lamvcf.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 Los Altos Mountain View Community Foundation  
 Donor Advised Fund at Foundation named: \_\_\_\_\_  
 Other: \_\_\_\_\_

## **BROKER:**

In reference to the aforementioned account, please deliver via DTC, the shares of the following securities (see page 2) to Los Altos Mountain View Community Foundation via:

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

\_\_\_\_\_ shares of \_\_\_\_\_  
(Quantity) (Name of Securities)

\_\_\_\_\_ shares of \_\_\_\_\_  
(Quantity) (Name of Securities)

\_\_\_\_\_ shares of \_\_\_\_\_  
(Quantity) (Name of Securities)

\_\_\_\_\_ shares of \_\_\_\_\_  
(Quantity) (Name of Securities)

\_\_\_\_\_ shares of \_\_\_\_\_  
(Quantity) (Name of Securities)

\_\_\_\_\_ shares of \_\_\_\_\_  
(Quantity) (Name of Securities)

\_\_\_\_\_ shares of \_\_\_\_\_  
(Quantity) (Name of Securities)

\_\_\_\_\_ shares of \_\_\_\_\_  
(Quantity) (Name of Securities)

\_\_\_\_\_ shares of \_\_\_\_\_  
(Quantity) (Name of Securities)

\_\_\_\_\_ shares of \_\_\_\_\_  
(Quantity) (Name of Securities)

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

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

rev. 08232021