Gift of Stock to San Francisco Heritage

Thank you for considering a gift of stock to San Francisco Heritage. We appreciate your generous support!

When making your donation, please have your stock broker refer to the following information and procedures to ensure an accurate and timely transaction. It is important that we are notified prior to every stock transfer, in order for us to accurately identify, allocate, and acknowledge your gift.

Charitable Organization Information

Name: San Francisco Heritage  
Address: 2007 Franklin St., San Francisco, CA 94109  
Phone: (415) 441-3000  
Contact Person: Woody LaBounty, ext. 20, wlabounty@sfheritage.org

DTC Delivery Information

Acct #: 1116-8372  
Tax ID: 23-7135037  
Agent Bank Name: Charles Schwab  
DTC #: 0164  
Account Name: San Francisco Architectural Heritage  
Acct #: 1116-8372  
Charles Schwab  
Customer Service: (800) 435-4000

Please have your broker confirm the donation at the time of the transaction by emailing a copy of the valuation letter to Woody LaBounty at wlabounty@sfheritage.org. Ask that your broker include your name as the donor, the number of shares and their value on the date of transfer, and the total gift amount. Please also specify whether the gift is unrestricted or should be designated to ____________________________.

After the gift is received, donors will receive a letter from SF Heritage acknowledging the contribution based on the valuation letter.

Thank you, again, for your support of San Francisco Heritage.

A sample letter to provide to your stock broker is attached for your convenience.

Stock Transfer Request
Gift to San Francisco Heritage

[Date]
[Name of your Broker]
[Address of your Broker]
[City, State & Zip]

I would like to make a contribution to San Francisco Heritage to be used for
    a) general operating support, or
    b) _____________________________________________.

Please transfer ______ shares of _________________________________ stock from my account
#__________________ to San Francisco Heritage via its account at Charles Schwab (account
name: “San Francisco Architectural Heritage”).

The transfer information is noted below:
DTC #0164
Charles Schwab Account #: 1116-8372
San Francisco Heritage Tax ID #: 23-7135037

The contact at San Francisco Heritage is Woody LaBounty, at wlabounty@sfheritage.org or
(415) 441-3000, ext. 20.

Please inform me when the transfer has been made:

Email: _____________________________________

Address: ___________________________________________________________________________

Sincerely,

** Contributor, please also email a copy of this completed form to wlabounty@sfheritage.org. Thank you.**