

STOCK TRANSFER INSTRUCTIONS FOR CHARITABLE GIFTS TO



Please contact your broker with transfer instructions (see below). Complete the Letter of Authorization and submit a copy to your broker and to Bay Scholars.

Please instruct your broker to use the following information for transfer purposes.

Account information for DTC transfer:

TO: Charles Schwab
NAME: Bay Scholar
DTC #: 0164
ACCOUNT #: 1603-3511
CODE: 40

Contact at Charles Schwab:

Brian Moriarty
415-667-6230
brian.moriarty@schwab.com

For your tax purposes, you will receive an acknowledgement letter via mail once Bay Scholars has received notice of the transfer and sale of the donated securities.

Should you have any questions, please contact Director of Institutional Advancement, Lloyd Schine at 415- 591-1807 or lloyd@bayscholars.org.

THANK YOU FOR YOUR SUPPORT!

Bay Scholars
465 California Street, 16th Floor
San Francisco, CA 94104
415-591-1810 • [www. bayscholars.org](http://www.bayscholars.org)
TAX ID# 46-3467917



LETTER OF AUTHORIZATION

Date _____

Donor's Brokerage Firm: _____

Address _____

RE: Gift of Securities to Bay Scholars

This letter authorizes and directs you to transfer the following securities from my/our account to Charles Schwab for Bay Scholars:

_____ shares of _____

_____ shares of _____

_____ shares of _____

_____ shares of _____

FROM:

Account Name _____

Account # _____

TO:

Bay Scholar

DTC #: 0164

Charles Schwab Account #1603-3511

Thank you for your assistance.

Sincerely,

Account Owner

Joint Account Owner

Please email a copy to: Lloyd Schine, Bay Scholar Director of Institutional Advancement at lloyd@bayscholars.org