

## 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: The Bank of New York Mellon  
DTC #: 8275  
REFERENCE #: 10533884000 Bay Scholars-IMA

Contact at BNY Mellon:

Andrew Baumgartner  
(415) 656-6743  
[andrew.baumgartner@bnymellon.com](mailto:andrew.baumgartner@bnymellon.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](mailto:lloyd@bayscholars.org).

THANK YOU FOR YOUR SUPPORT!

Bay Scholars  
465 California Street, 16<sup>th</sup> 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 The Bank of New York Mellon for Bay Scholars:

\_\_\_\_\_ shares of \_\_\_\_\_

\_\_\_\_\_ shares of \_\_\_\_\_

\_\_\_\_\_ shares of \_\_\_\_\_

\_\_\_\_\_ shares of \_\_\_\_\_

FROM:

Account Name \_\_\_\_\_

Account # \_\_\_\_\_

TO:

**Bay Scholars**

**DTC #: 8275 / The Bank of New York Mellon**

**Reference: 10533884000 BAY SCHOLARS-IMA**

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](mailto:lloyd@bayscholars.org)