



since 1979

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To make a stock gift to San Francisco Waldorf School:

DTC OR ELECTRONIC TRANSFER INSTRUCTIONS

DTC or Electronic transfer is the fastest and most secure method for donating securities. This is a two-step process.

- 1- Please notify **Mitch Mitchell** (mmitchell@sfwaldorf.org) with your intention to donate securities prior to initiating the transfer of securities to San Francisco Waldorf Association. **Prior notification is critical to identifying your gift of securities, as donor information does NOT transmit through the DTC system.**
- 2- Our account is held at First Republic Securities Company LLC (FRSC). Broker Instructions to deliver securities to our brokerage account at FRSC:

Deliver To	First Republic Securities Company LLC
DTC	0443(Clearing through Pershing LLC)
Account Number	33L264596
Account Name	San Francisco Waldorf School Association
Reference	{Donor Name-Year} or {Anonymous}

Mutual Fund Instructions

Please contact **Gloria Wong** or **Bill Carroll** (onlinebrokerage@firstrepublic.com) at First Republic Securities Company (FRSC) and **Mitch Mitchell** (mmitchell@sfwaldorf.org) at San Francisco Waldorf School to initiate a transfer of mutual fund securities.

The following information is required to complete the transaction:

Account Number	33L264596
Share Quantity	
Symbol	
Donor Name	{Donor Name-Year} or {Anonymous}
Financial Institution	

Important Note

Your gift will not be complete until you notify San Francisco Waldorf School of your intent to donate securities, and until shares are received in the San Francisco Waldorf School Association's First Republic Securities Company (FRSC) brokerage account. Please email Geoff Bennett (gbennett@sfwaldorf.org) if you have any questions.