



Instructions for Gifts of Stock or Mutual Funds to Urban School of San Francisco Federal Tax Id # 94-1622034

1. Notify Urban of your upcoming stock and/or mutual fund transfer:

It is critical you notify Urban's Development Office before you make a transfer as donor information does not automatically transmit through DTC system. Please contact Rebecca Thurber via email at rthurber@urbanschool.org, via phone at 415 593 9540, or by filling out [this form](#).

Please include the following information so that we can properly credit your gift:

Your Name:
Name of the Stock/Securities:
Number of Shares:
Estimated Value:
Purpose of Donation (ex. Annual Fund):

2. Make your donation:

DTC or Electronic Transfer Instructions:

Deliver to: First Republic Securities Company LLC
DTC: 0443 (Clearing through Pershing LLC)
Account Number: 33L280261
Account Name: The Urban School of San Francisco
Reference: *Include your name or note if gift is anonymous*

Mutual Fund Instructions:

Please contact Gloria Wong at First Republic Securities Company at onlinebrokerage@firstrepublic.com with the following information:

Account Number:
Share Quantity:
Symbol:
Donor Name: *Include your name or note if gift is anonymous* Financial Institution:

Should you have any questions, please call Urban's Development Office at 415 593 9540. It is important that you or your broker notify us as soon as the stock or mutual fund is transferred to our account as only then are we able to receipt and process the stock transfer according to your wishes. Thank you for your support!