



Stock/Securities Transfer Directions

Please alert the SF Day Advancement Office of an upcoming transfer. Because your name will not accompany the electronic transfer, we need the following information in order to acknowledge your gift correctly and issue a proper tax credit:

- 1) Donor name and contact information
- 2) Name of stock
- 3) Number of shares being transferred
- 4) Estimated value
- 5) Purpose of gift (example: Annual Fund)

Please send this information to Alex Katzenstein, Director of Annual Giving and Alumni Relations akatzenstein@sfday.org, Briana Voss, Advancement Associate advancementdata@sfday.org, and Erin Wright, Director of Advancement ewright@sfday.org.

SF Day's account information and First Republic contacts:

- Account: 33L053668
- DTC: 0443
- Firm: First Republic Securities Company
- First Republic Brokers: Gloria Wong (212-259-5056) and Mike Mancini (415-288-8091) or onlinebrokerage@firstrepublic.com

The date of your gift for tax purposes is the date shares hit the SF Day account. The gift value will be the mean average of the stock's high and low values on the day we receive the shares. Please consult with your tax or financial advisor to maximize your tax write-off.

Thank you again for your generosity. If you have any questions, please reach out to Erin Wright, Director of Advancement at ewright@sfday.org or 415-568-3641.