



GRADE SCHOOL CAMPUS
2938 Washington Street
San Francisco, CA 94115
415.931.2750

HIGH SCHOOL CAMPUS
470 West Portal Avenue
San Francisco, CA 94127
415.431.2736

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 *Eric Norman* (enorman@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 The Vanguard Group, Inc.. Broker Instructions to deliver securities to our brokerage account:

Deliver To	The Vanguard Group, Inc.
DTC	0062
Account Number	43291742
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 *Eric Norman* (enorman@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 Emily Hilldore (childore@sfwaldorf.org) if you have any questions.