



## Gift of Stock Donation Form

Thank you for making a gift of stock to Filoli. Please complete this form in advance of initiating your transfer.

Donor Name: \_\_\_\_\_ Transfer Date (MM/DD/YYYY): \_\_\_\_\_

Financial Advisor Name and Phone No.: \_\_\_\_\_

Stock Name: \_\_\_\_\_ Ticker Symbol: \_\_\_\_\_ No. of Shares: \_\_\_\_\_

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Phone Number

### Instructions

1. Return this form to Filoli.

**Mail:** Filoli Center

**Email:** [development@filoli.org](mailto:development@filoli.org)

**Fax:** 650-366-7836

Attention: Development Office

86 Cañada Road, Woodside, CA 94062

2. Submit a completed copy of this form to your broker. Filoli is not authorized to initiate the transfer of stock on your behalf.

3. Please provide your financial advisor with the following brokerage information for Filoli Center:

Brokerage House: First Republic Securities Company, LLC

Account Name: Filoli Center

Account Number: 33L149797

General Address: 111 Pine Street, San Francisco, CA 94111

General Email: [onlinebrokerage@firstrepublic.com](mailto:onlinebrokerage@firstrepublic.com)

Private Banker Contact: Tien Ha, PBO Assistant Manager – Preferred Banking Offices

Address: 1155 California Drive Suite D, Burlingame, CA 94010

Phone: (650) 762-3606

Email Address: [tha@firstrepublic.com](mailto:tha@firstrepublic.com)

Filoli TAX ID (EIN): 95-2996648

4. When you have initiated the transfer of stock, please contact our Development Office at (650) 364-8300 ext. 242. This will allow us to confirm receipt of your gift and provide timely acknowledgment. Thank you again for supporting Filoli!