



## Gift of Stock Donation Form

### Instructions

Please complete this form **before** initiating your stock transfer.

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

Financial Advisor Name and Phone: \_\_\_\_\_

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

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

\_\_\_\_\_  
Date

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

Submit a completed copy of this form to your broker along with the following Filoli Center brokerage information:

Brokerage House: Charles Schwab & Co.  
Account Name: Filoli Center  
TAX ID (EIN): 95-2996648  
Account Number: 6483-4756  
DTC #: 0164

Filoli is not authorized to initiate the transfer of stock on your behalf.

Once your stock transfer is initiated, please send Filoli a copy of this completed form via email, fax, or mail. This allows for an accurate and timely acknowledgment letter for your records.

Filoli Center  
Attention: Development Office  
86 Cañada Road, Woodside, CA 94062  
[development@filoli.org](mailto:development@filoli.org) fax 650-366-7836

**Thank you for your generous support of Filoli!**