



STOCK TRANSFER INSTRUCTIONS

Thank you for your generosity!

Your completion of this form provides instructions to our team so that your gift is directed as you intend.

Please fill out the form and email the completed version to cfgifts@cfsc.org, before initiating the transfer. We will email confirmation once the shares are received.

Date:

Donor's Name:

Donor's Address:

Donor's Phone Number:

Broker's Name:

Firm Name:

Name of Stock:

Number of Shares:

Fund Name or Purpose of Gift:

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Transfer stock to: Morgan Stanley
1333 North California Blvd, Suite 133
Walnut Creek, CA 94596

Contact Name / Phone Number: Justin Crocker / (925)746-2921

DTC #: 0015

Receiving Account Number: 838-010259

Receiving Account Name: Community Foundation Santa Cruz County

Community Foundation Tax ID #: 94-2808039