

## San Francisco Friends School Stock Donation Form

This form may be used to complete stock contributions to the San Francisco Friends School, or you may use it as a template to create a letter to be sent to your broker.

Making a gift of stock to SFFS is a two-step process:

1. Notify Margaret Thompson ([mthompson@sffriendsschool.org](mailto:mthompson@sffriendsschool.org)) in the Development Office of your intention to donate securities and include the number of shares as well as the name of the security.

Prior notification of your gifts is critical to identifying and acknowledging your gift in a timely manner as donor information **does not transmit** through the DTC system First Republic uses.

2. Notify your broker of the transfer using the following information:

Our account is held at  
First Republic Securities Company LLC  
111 Pine Street, 7<sup>th</sup> Floor  
San Francisco, CA 94111  
[schonerteam@firstrepublic.com](mailto:schonerteam@firstrepublic.com)  
415.262.4118

Credit Account Name: San Francisco Friends School  
Credit Account #: 33L098564 (Stock Donation Account)  
Pershing LLC DTC# 0443  
SFFS Tax ID# 94-3397589

Please accept this letter as authorization to gift \_\_\_\_\_ of \_\_\_\_\_.  
(# of Shares) (Name of Security)

Designation of the gift: \_\_\_\_\_

Client Account Title: \_\_\_\_\_

Client Account #: \_\_\_\_\_

Sincerely,

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Phone/Email

\_\_\_\_\_  
Phone/Email