

## GIFT TRANSFER INSTRUCTIONS

Thank you for your partnership with the San Francisco Foundation. Prior to initiating a transfer, please contact Pamela Doherty so she can help facilitate your gift, give notice to the receiving financial institution and ensure your contribution is allocated correctly to your fund.

**Phone:** (415) 733-8521

**Email:** [pdoherty@sff.org](mailto:pdoherty@sff.org)

### Stock Transfer Instructions

To facilitate your gift, please transfer securities to the foundation's brokerage account at Morgan Stanley. Please ask your broker to reference the full title on your account as donor and the donor fund to be credited.

**Contact Information**

Morgan Stanley  
Attn: Gale Group/Steven Amos  
1333 North California Blvd, Suite 133  
Walnut Creek, CA 94596  
Phone: (925) 746-2936  
Fax: (925) 246-5045

**Account Information**

Account Number: 125-523576-115  
Account Name: The San Francisco  
Foundation  
DTC Number: 0015

If you hold the stock certificate you wish to donate, you may deliver it to the foundation along with a signed stock power or mail it. Please send the signed stock power under separate cover.

### Cash Funds Transfer Instructions

To transfer cash funds electronically, please use the account information below. Please include the beneficiary information in your transfer instructions.

**Contact Information**

The San Francisco Foundation  
One Embarcadero Center, Suite 1400  
San Francisco, California 94111  
Deposit & Transit Account  
**Account #4121881882**

**Bank Information**

Wells Fargo Bank  
420 Montgomery Street  
San Francisco, California 94104  
**ABA#121000248**  
**SWIFT ID: WFBIUS6S**

### Mutual Funds

Morgan Stanley can handle most mutual fund transactions. However, there are several mutual funds that can only be handled directly through the mutual fund firm. These gift transactions will take longer to complete than a standard gift of publicly traded stock or mutual funds. To handle your gift as efficiently as possible, please contact Pamela Doherty at (415) 733-8521 to confirm the trading status of your mutual fund.