



## GIFT OF STOCK INSTRUCTIONS

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### THANK YOU FOR YOUR INTEREST IN MAKING A CHARITABLE GIFT TO THE CALIFORNIA FIRE FOUNDATION IN THE FORM OF A STOCK TRANSFER.

**Please complete and return the third page of this form to receive your tax-acknowledgement.**

For stock held in brokerage accounts, your broker can assist you in making a gift of stock via a direct transfer to the California Fire Foundation. Giving a gift of publicly traded stock that has increased in value and that you have owned for more than one year may provide better tax benefits than giving cash. Your charitable income tax deduction is equal to the fair market value of the stock and you avoid paying the capital gains tax on any increase in the current value over the original cost of the stock. You may also save on brokerage fees because you are transferring ownership rather than selling the stock.

If you would like to donate stock to the California Fire Foundation (tax ID# 68-0118991), please note the following:

- Brokerage House: Morgan Stanley
- Account Name: California Fire Foundation
- Account Number: 142-029278-003
- California Fire Foundation Contact: **Kara Haynes**
- California Fire Foundation Telephone Number: (916) 641-1707
- DTC Number: 0015
- Reference: Donor Name (Including your name will ensure the gift is properly acknowledged.)

**\*\*Please Note: For mutual fund gifts, or for gifts of stock not held in a brokerage account, please contact the California Fire Foundation with the contact information listed above.\*\***



## GIFT OF STOCK FORM



**Return to:**

California Fire Foundation  
Gift Planning  
1780 Creekside Oaks Dr.  
Sacramento, CA 95833  
Phone: 800-890-3213  
Fax: 916-921-1106  
[www.cafirefoundation.org](http://www.cafirefoundation.org)  
[cafirefoundation@cpf.org](mailto:cafirefoundation@cpf.org)

California Fire Foundation is a charitable, non profit 501 (c)(3) organization. Tax ID #68-0118991

Please complete the information below to notify the California Fire Foundation of your gift and help ensure it is processed accurately.

**DONOR & SECURITIES INFORMATION:**

Name & Type of Securities (e.g.: DELL common stock) \_\_\_\_\_

Security Symbol \_\_\_\_\_ Number of Shares \_\_\_\_\_ Transfer Date \_\_\_\_/\_\_\_\_/\_\_\_\_

Special Instructions \_\_\_\_\_

Donor Name (Individual, Corporation, Foundation) \_\_\_\_\_

Donor Street Address \_\_\_\_\_

Donor City / State / Zip \_\_\_\_\_

Broker Name \_\_\_\_\_

Broker Company / City / State \_\_\_\_\_

Broker Contact / Telephone Number \_\_\_\_\_

Donor Telephone / Email Address (to be used only if a question arises in the donation process)  
( \_\_\_\_\_ ) \_\_\_\_\_ - \_\_\_\_\_ / \_\_\_\_\_

Donor Signature \_\_\_\_\_ Date Signed \_\_\_\_/\_\_\_\_/\_\_\_\_

Donor Signature \_\_\_\_\_ Date Signed \_\_\_\_/\_\_\_\_/\_\_\_\_

**NOTE** - All account owners must sign this request (e.g. an individual account would require one signature; a Joint Tenants in Common account would require two signatures)

Please consult with your tax advisor before making a charitable donation to any charity.

You may be eligible to increase the power of your donation with employer matching funds. Many employers will match your personal donation. Check with your company for more information on matching gift programs. Employer matching gifts may also be available to you if you are the spouse of an employee, a retired employee, or the spouse/widow/widower of a retiree.

Thank you again for considering California Fire Foundation as the recipient of your charitable gift.