



STOCK DONATION FORM

Thank you for your inquiry about a transfer of securities to the San Luis Coastal Education Foundation. We are grateful for your desire to invest in the future of education. Please find below the information required to complete your securities transfer.

After completing and signing this form, please:

1. Send one copy to your broker (only your broker can initiate the stock transfer)
2. Send one copy via mail or email to:

San Luis Coastal Education Foundation
1500 Lizzie Street
San Luis Obispo, CA 93401
crobertson@slcusd.org

OUR BROKERAGE FIRM

Charles Schwab & Company, Inc.
Contact Name: Kristen Reeves
(805) 541-1308

Account: San Luis Coastal Education Foundation
DTC Number: 0164
Account Number: 5474-6772
EIN Number: 82-4196024

DONOR INFORMATION

Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Email: _____ Telephone: _____

The San Luis Coastal Education Foundation is a tax-exempt organization under 501(c)(3) of the Internal Revenue Code and is qualified for charitable contribution deductions.

TRANSFERRING BROKER

Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Email: _____ Telephone: _____

SECURITIES GIFTED

Name of Account: _____

Account Number: _____

SECURITY 1:

Date of Transfer: _____ Number of Shares: _____ Approx. Value: _____

Name of Security: _____ Stock Symbol: _____

SECURITY 2:

Date of Transfer: _____ Number of Shares: _____ Approx. Value: _____

Name of Security: _____ Stock Symbol: _____

SECURITY 3:

Date of Transfer: _____ Number of Shares: _____ Approx. Value: _____

Name of Security: _____ Stock Symbol: _____

Donor's Signature

Date

Donor's Printed Name