

GIFT INSTRUCTIONS

The logo for The San Francisco Foundation, featuring the text "THE SAN FRANCISCO FOUNDATION" in white, stacked vertically on a red rectangular background.

General Transfer Instructions

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

Phone: 415-733-8590

Email: donorservices@sff.org

Fax: 415-399-1610

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 your account, the precise name of the 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 precise name of the donor, and the donor fund to be credited in in your transfer instructions.

Account 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 the Development and Donor Services Department at 415.733.8590 to confirm the trading status of your mutual fund.