

TRANSFER INSTRUCTIONS FOR GIFTS OF STOCK

THE
SAN
FRANCISCO
FOUNDATION

Please notify The San Francisco Foundation in writing whenever you intend to transfer a gift of securities. The simplest way to do this is to fax to the Foundation a copy of the instructions that you give to your broker. Address this fax to **ATTN: Development and Donor Services at (415) 399-1610**. The letter of instruction should include a description of the security (e.g. 50 shares of XYZ Corporation common stock) as well as the name of your donor advised fund at the Foundation.

To facilitate your gift, please transfer securities to the Foundation's brokerage account at Morgan Stanley:

Name:	Morgan Stanley Attn: Gale Group/Steven Amos
Address:	1333 North California Blvd, Suite 133
City, State, Zip:	Walnut Creek, CA 94596
Direct Line:	925.746.2936
FAX:	925.246.5045
Account #:	125-523576-115
Account Name:	The San Francisco Foundation
DTC #:	0015
Reference:	<i>Please ask your broker to reference the primary advisor and the donor advised fund to be credited. A maximum number of 35 characters can be entered in this reference field.</i>

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

**ATTN: Development and Donor Services
The San Francisco Foundation
One Embarcadero Center, Suite 1400
San Francisco, CA 94111**

Mutual Funds

Morgan Stanley can handle most mutual fund transactions. However, there are a number of 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. In order to handle your charitable gift as efficiently as possible, please contact **Development and Donor Services at 415.733.8590** to confirm the trading status of your mutual fund.

The Foundation's Tax ID Number is 01-0679337.