



SANTA BARBARA
EDUCATION
FOUNDATION

1528 Chapala Street, Suite 308
Santa Barbara, CA 93101
(805) 284-9125
sbfoundation.org

Stock Transfer Instructions

Thank you for choosing to gift stock to the Santa Barbara Education Foundation! It is important that you (or your broker) notify us via phone (805) 284-9125 or email (melissa@santabarbaraeducation.org) when the gift is being transferred to our account, as the stock may arrive without identification. When notified, a staff member will send you an acknowledgment letter with a description of the securities and the date the transaction took place.

Gifts may be made in the following manner:

Securities held by a broker:

Send a letter of authorization to your broker giving instructions to transfer the securities to the following firm:

LPL Financial
DTC CLEARING #0075
FOR FURTHER CREDIT TO LPL ACCOUNT # 6995-7147
FOR FURTHER CREDIT TO LPL ACCOUNT NAME: SANTA BARBARA EDUCATION FOUNDATION

The transaction is complete when the securities are deposited into the Santa Barbara Education Foundation's account, not the day the letter of authorization is delivered.

Certificates held by donor:

Deposit the actual certificates into your brokerage account with a letter of authorization giving instructions to transfer the securities to the following firm:

LPL Financial
DTC CLEARING #0075
FOR FURTHER CREDIT TO LPL ACCOUNT # 6995-7147
FOR FURTHER CREDIT TO LPL ACCOUNT NAME: SANTA BARBARA EDUCATION FOUNDATION

If you do not have a broker, please contact the Santa Barbara Education Foundation directly, and staff will work with you to handle the transfer of your securities. The sale or retention of the securities shall be at the discretion of the Santa Barbara Education Foundation. The Santa Barbara Education Foundation's tax ID number is 77-0071544.

If you need further assistance, please contact Melissa Davenport at (805) 284-9125 or melissa@santabarbaraeducation.org.