

Cedars

Creative, Productive, Joyous Lives



Stock Donation Form

Thank you for your generous gift to Cedars, helping to ensure that every person served by our organization has a life of quality, purpose and pride. You can make your gift of securities in two easy steps:

1. Initiate the transfer

Electronic delivery of stock shares is the most secure and expedient delivery process available. Please provide the following instructions to your broker:

Deliver to:

Charles Schwab & Co., Inc.
DTC Clearing 0164, Code 40
FBO: The Cedars of Marin – Pass Through
Destination Account: 7446-6408
Tax ID Number: 94-1606518

For questions about transferring paper stock certificates, contact our investment manager:

T.J. Troutner
Equius Partners
tj@equiuspartners.com / (415) 382-2500

2. Notify Cedars

Please fill out the form below, so that we can acknowledge your gift and provide you with a tax receipt.

Donor Information

Name

Address

City

State

Zip Code

Email Address

Phone

I would like to remain anonymous

Donation Information

Today's Date

Date of Transfer

Number of Shares

Name of Security & Ticker Symbol

Transferring Broker

Please return your completed form by mail, fax, or email to:

Katie Ladouceur, Director of Development
KatieL@cedarslife.org / (415) 526-1354