

CROCKER **art museum**

Instructions for Gifts of Stock, Bonds and Mutual Funds

To make a transfer of stock, bonds, or mutual funds please use the form below (see page two).

Additionally, please provide the Crocker with information on the stock:

- Name of donor
- Name of stock
- Number of shares
- When we can expect the transfer in our account
- What the gift will be applied to at the Crocker (Capital Campaign, Membership, etc.)

Please contact Chelsea Larson, Annual Giving Manager, at clarson@crockerart.org or (916) 808-8838 for additional assistance.

The stock will be valued according to the day it is transferred into our Charles Schwab account. The gift amount you will be acknowledged for is based on this value, which is determined by taking the average of the high and low on the day the securities are received.

Questions regarding the Charles Schwab account may be directed to:

Heather Schubert

Client Service Associate
Genovese Burford & Brothers

1515 Response Road
Sacramento, CA 95815

P: (916) 924-7527

F: (916) 646-3287

Heather@gbbwealth.com

The Crocker Art Museum Association is a tax-exempt, nonprofit organization as described in section 501(c)(3) of the IRS code. Our tax identification number is 94-2552486.

CROCKER art museum

Date: _____

To: _____ From: _____

Address: _____

City/State/ZIP _____

Attn: _____

Re: Account # _____

Name of _____

Dear _____:

Please accept this letter as your authorization to electronically transfer (through DTC) the below listed securities from our account above as follows:

<u>#/shares</u>	<u>Name of Security</u>
_____	_____
_____	_____

To: Charles Schwab
DTC #: 0164
Account #: 3784-6566
Code #: 40
Account Name: Crocker Art Museum Association

Please execute this transfer as soon as possible.

Sincerely,

Please send a copy of this completed letter by mail or fax to:

Heather Schubert

Client Service Associate
Genovese Burford & Brothers

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