

SECURITY (Stocks, Bonds, etc.) DONATION
to
Santa Clara Valley Audubon Society (SCVAS)

It is almost always more tax-efficient to donate appreciated securities rather than cash. Please consult with your own tax advisor before donating to verify if there is any tax advantage in your specific case. Use this form to arrange the security transfer with your broker, afterwards send the completed form to SCVAS. Receipt of this form will confirm your donation and allow SCVAS to send you an acknowledgement.

Santa Clara Valley Audubon Society is approved by the IRS as a 501c(3) non-profit organization. Your tax-deductible gift helps fund our education and conservation programs in the California Bay Area.

1. Fill out this form and send it to us. Please contact us if you have any questions or need completing this transfer.

Santa Clara Valley Audubon Society
22221 McClellan Road
Cupertino, CA 95014
Attn: Executive Director
Phone: (408) 252-3748
Fax: (408) 252-2850
Email: scvas@scvas.org

2. Provide your information – we will use your contact information only to properly acknowledge your gift or to contact you in case of a problem with the transfer.

Name:

Address:

City:

State:

Zip:

Email:

Phone:

3. Give details of the stock(s) donation – provide the date that your stocks were transferred plus the name and number of shares for each security type (if more than one).

Date of transfer:

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Name of first group of securities:

Number of shares:

Name of second group of securities, if any:

Number of shares:

Name of third group of securities, if any:

Number of shares:

4. Describe how the stock will be delivered – you can donate stock held at a brokerage electronically or paper stock certificates directly.

Electronic stock: give the following information about SCVAS' brokerage account to your stock broker to facilitate an electronic transfer of your stock:

Name of broker: Charles Schwab

Charles Schwab Customer Representative: 1-800-435-9050

Account Name: Santa Clara Valley Audubon Society

Account Number: 77860184

Tax ID Number: 946081420

DTC Number: 0164

or:

Paper stock certificates: mail your *unendorsed* stock certificates and stock power form via *registered mail* in *separate* envelopes directly to SCVAS at the address in instruction 1 above. You can also deliver your certificate(s) and stock power form in person at our office.

5. Privacy statement – SCVAS will use this information only to facilitate the stock transfer and acknowledge the donation to you.

6. Intent

I donate the above mentioned stocks to Santa Clara Valley Audubon Society.

(signature of donor)