



CALIFORNIA
COMMUNITY
FOUNDATION

*Building the Future
of Los Angeles*

INSTRUCTIONS FOR CONTRIBUTIONS OF STOCKS AND BONDS

Certificate Transfer. If you are giving stock or bond certificates registered in your name(s), we need a “gifting letter” detailing your gift. This letter and a “stock power form” must be signed by all owners listed on the certificates, exactly as they are registered. A sample “gifting letter” and “stock power form” are attached.

Note: Certificates Held in a Trust. If your certificates are held in the name of a trust, try to deposit them into a bank or brokerage account so you can transfer the shares by DTC electronic transfer. Otherwise, if you wish to contribute certificates that are in your trust’s name, you must provide a copy of your trust to our broker so the transfer agent will know that the trustees signing are empowered to gift the assets and will be able to verify the signatures. The transfer agent also needs the same notarized gifting letter and stock power referenced above signed by all trustees.

Resources. Listed below are people who can assist with your contribution of stock or bonds.

California Community Foundation:

Nichole Baker, Vice President, Development & Donor Relations
Agnes Luansing, Accounting Manager
(213) 413-4130

**SAMPLE LETTER FOR
CERTIFICATE TRANSFER**

Date

Charles Schwab
355 S. Grand Avenue, Suite 110
Los Angeles, CA 90071

RE: Gift of Stock to California Community Foundation Charles Schwab Account #2035-9907

Dear Sir or Madam:

This letter constitutes my direction to you to transfer the following shares of stock from my ownership to the California Community Foundation.

<u>No. of Shares</u>	<u>Company</u>	<u>Certificate No.</u>
_____	_____	_____

I intend this transfer to be a gift to the California Community Foundation. I hereby relinquish all right, title and interest in these securities and I do hereby finally and irrevocably release and discharge you of any claims by me or my legal representatives with reference thereto, including the proceeds of the sale and disposition thereof.

Please expedite this transfer and advise me when it is complete.

Very truly yours,

Signature

Both Signatures if Joint Account

IRREVOCABLE STOCK OR BOND POWER

For Value Received, the undersigned does (do) hereby sell, assign and transfer to:
California Community Foundation
221 South Figueroa Street, Suite 400
Los Angeles, CA 90012
Taxpayer I.D. Number 95-3510055

**IF STOCK,
COMPLETE
THIS PORTION**

_____ Shares of the _____ Stock of

Represented by certificate(s) No(s) _____
inclusive,
Standing in the name of the undersigned on the books of said
Company.

**IF BONDS,
COMPLETE
THIS PORTION**

_____ Bonds of _____

In the principal amount of \$ _____ No(s).
_____ inclusive, standing in the name of the
undersigned on the books of said Company.

The undersigned does (do) hereby irrevocably constitute and
appoint

Attorney to transfer the said stock or bond(s), as the case may be,
on the books of said Company, with full power of substitution in
the premises.

IMPORTANT: The signature(s) to this power
must correspond with the name(s) as written
upon the fact of the certificate(s) or bond(s)
in every particular without alteration.

FOR OFFICE USE ONLY

TITLE WHICH APPEARS ON CERTIFICATE

TITLE WHICH APPEARS ON CERTIFICATE

[PERSON(S) EXECUTING THIS POWER SIGN(S) HERE]

Account No.

Dated:
