



## Gifts of Stock Transaction Form

Thank you for your interest in making a gift of stock to the San Francisco Estuary Institute.  
**Please complete this form and mail or fax to SFEI:**

**MAIL:** San Francisco Estuary Institute      **FAX:** 510-746-7300  
Attention: Development Department  
4911 Central Avenue  
Richmond, CA 94804

Please provide your financial advisor with the following information about SFEI's brokerage account with Heffernan Financial Services.

**Account:** LPL Financial  
**Account Number:** 59073149  
**DTC#:** 0075  
**Address:** 1460 O'Brien Drive, Ste. B  
Menlo Park, CA 94025

**Representative:** Anthony Calomeni  
**Phone Number:** 650-842-5200  
**Fax Number:** 650-842-5201

**San Francisco Estuary Institute Tax ID#:** 94-2951373

**You or your broker must also provide the following information:**

- Donor's name and complete address
- Name of securities
- Number of shares transferred
- Financial advisor's name and contact information
- Specific SFEI program, if any, to which gift should be directed

The value of a stock gift is the average of the high and low trading values on the date of transfer. The date of transfer is the date on which the shares reach the Conservatory's account when transferred electronically or the postmark date when sent by mail. Please consult your tax advisor for the amount of your charitable deduction.

**When you have instructed transfer of the stock, please contact SFEI, so that we may confirm receipt of your gift and provide a timely acknowledgement letter.**

Development Department  
510-746-7334  
[development@sfei.org](mailto:development@sfei.org)

Patrick Walsh, Director of Finance  
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