

**Kiddo!**  
**Mill Valley Schools Community Foundation**  
**Securities Transfer Request Form**

409 Sycamore Avenue, Mill Valley, CA 94941  
415-389-7789  
415-389-7766 fax

Shares can be transferred directly from your brokerage account to the Kiddo! (Mill Valley Schools Community Foundation) account. Complete the form below and **send a signed copy to your broker. Only your broker can initiate the transfer.** Please check with your broker for additional requirements. Thank you!

*Please also fax a copy of this form to Trisha Garlock at 415-389-7766 or email to [tgarlock@kiddo.org](mailto:tgarlock@kiddo.org) so we can acknowledge your donation properly.*

Date: \_\_\_\_\_

To: \_\_\_\_\_ (Broker Name)  
\_\_\_\_\_ (Broker Firm)  
\_\_\_\_\_ (Broker Phone Number)

Please accept this letter as your authorization to irrevocably transfer:  
(name of stock, number of shares)

---

Which you hold in the name of:  
(account title at brokerage firm)

---

From my account number:

\_\_\_\_\_

to the account of Mill Valley Schools Community Foundation (Kiddo!).

Please transfer via DTC as follows:  
Charles Schwab & Co DTC Clearing #0164 code 40  
Account number: 6293-4723  
Acct Registration:  
    Mill Valley Schools Community Foundation  
    Tax ID #94-2828305

If you have any further questions please call Trisha Garlock at (415)389-7789 ext. 1 or Mike Graziano at Wetherby Asset Management, 415-399-9159.

Signature(s) of account owner(s):  
Please provide Kiddo! with my name as donor of this gift.

---

Gift Designation (purpose of gift i.e. annual campaign, endowment, etc.)

---

THANK YOU!