



721 Cliff Drive
Santa Barbara, CA 93109
(805) 730-4401
sbccfoundation.org

Stock Transfer Instructions

Thank you for choosing to gift stock to the SBCC Foundation! **It is important that you (or your broker) notify us via phone (805) 730-4401 or email (hewlett@sbccfoundation.org) when the gift is being transferred to our account, as the stock may arrive without identification.** When notified, a staff member will send you an acknowledgment letter with a description of the securities and the date the transaction took place.

Gifts may be made in the following manner:

Securities held by a broker

Send a letter of authorization to your broker giving instructions to transfer the securities to either firm below:

Morgan Stanley Wealth Management
Account name: Foundation for Santa Barbara City College
Account number: 248-014880
DTC: 0015 (Morgan Stanley)

Schwab
Account name: Foundation for Santa Barbara City College
Account number: 9444-7455
DTC: 0164, code 40

The transaction is complete when the securities are deposited into the SBCC Foundation's account, not the day the letter of authorization is delivered.

Certificates held by donor

Deposit the actual certificates into your brokerage account with a letter of authorization giving instructions to transfer the securities to either firm below:

Morgan Stanley Wealth Management
Account name: Foundation for Santa Barbara City College
Account number: 248-014880
DTC: 0015 (Morgan Stanley)

Schwab
Account name: Foundation for Santa Barbara City College
Account number: 9444-7455
DTC: 0164, code 40

Our contact at Morgan Stanley Wealth Management is Jonathan Marshall Fuhrer. He can be reached at (805) 564-7930.

The Asset Transfer Team at Schwab can be reached at (877) 328-0276.

If you do not have a broker, please contact the SBCC Foundation directly and staff will work with you to handle the transfer of your securities.

The sale or retention of the securities shall be at the discretion of the SBCC Foundation. The SBCC Foundation's tax ID number is 95-3234551.

If you need further assistance, please contact Gretchen Hewlett at (805) 897-3537 or hewlett@sbccfoundation.org.