

# Cedars

Creative, Productive, Joyous Lives



## Stock Donation Form

Thank you for your generous gift to Cedars, helping to ensure that every person served by our organization has a life of quality, purpose and pride. You can make your gift of securities in two easy steps:

### 1. Initiate the transfer

Electronic delivery of stock shares is the most secure and expedient delivery process available. Please provide the following instructions to your broker:

**Deliver to:**

Charles Schwab & Co., Inc.  
DTC Clearing 0164, Code 40  
FBO: The Cedars of Marin – Pass Through  
Destination Account: 7446-6408  
Tax ID Number: 94-1606518

For questions about transferring paper stock certificates, contact our investment manager:

T.J. Troutner  
Equius Partners  
[tj@equiuspartners.com](mailto:tj@equiuspartners.com) / (415) 382-2500

### 2. Notify Cedars

Please fill out the form below, so that we can acknowledge your gift and provide you with a tax receipt.

#### Donor Information

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip Code

\_\_\_\_\_  
Email Address

\_\_\_\_\_  
Phone

I would like to remain anonymous

#### Donation Information

\_\_\_\_\_  
Today's Date

\_\_\_\_\_  
Date of Transfer

\_\_\_\_\_  
Number of Shares

\_\_\_\_\_  
Name of Security & Ticker Symbol

\_\_\_\_\_  
Transferring Broker

Please return your completed form by mail, fax, or email to:

Jeanne Lipson, Director of Development  
[jeanne@cedarslife.org](mailto:jeanne@cedarslife.org) / (415) 526-1354

Cedars \* P.O. Box 947 \* Ross, California 94957 \* (415) 454-5310 \* Fax (415) 454-0573