

# NAPA VALLEY

## COMMUNITY FOUNDATION

PLEASE COMPLETE THIS FORM, SUBMIT THE ORIGINAL TO YOUR BROKER, AND SEND A COPY TO SARAH LEHMAN, VICE PRESIDENT, AT NAPA VALLEY COMMUNITY FOUNDATION BY EMAIL TO SARAH@NAPAVALLEYCF.ORG.

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

To: \_\_\_\_\_

Broker's name

Brokerage Firm

Address

City/State/Zip

Daytime Phone Number

RE: \_\_\_\_\_  
Brokerage Account Name and Account Number

Dear Broker:

Effective \_\_\_\_\_, please transfer \_\_\_\_\_ shares of \_\_\_\_\_  
(DATE) (NUMBER OF SHARES) (COMPANY NAME)

from my account, referenced above, via the following instructions:

Charles Schwab & Co., Inc.  
DTC Clearing 0164, Code 40  
Account Registration: COMMUNITY FOUNDATION OF THE NAPA VALLEY (LIQUIDITY)  
Account Number: 6809-3610

This transfer represents an irrevocable contribution to Napa Valley Community Foundation, as of this date, for the benefit of the \_\_\_\_\_ Fund.  
(NAME OF FUND AT NVCF)

Thank you,

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name of Donor (Printed)

\_\_\_\_\_  
Address

\_\_\_\_\_  
City/State/Zip