

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