

Napa
Valley
Community
FOUNDATION

Please complete this form, submit the original to your Broker, and send a copy to Luz Casillas-Del Rosario, Finance and HR Manager, at Napa Valley Community Foundation by email to luz@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