



Thank you for your generosity! A gift of publicly traded stock is a wonderful way to support the causes you care about and make a lasting difference in Napa Valley.

Please share the following details with your broker so that they can transfer your gift to NVCF's account at Charles Schwab:

Account Name: COMMUNITY FOUNDATION OF THE NAPA VALLEY (LIQUIDITY)

Account #: 6809-3610

DTC #: 0164, Code 40

Foundation Tax ID: 68-0349777

If you are transferring stock **from your own Charles Schwab account**, please [use this form](#) from Schwab to expedite the internal transfer.

A few things to know:

- NVCF sells all shares upon receipt, and the proceeds will be directed to the fund(s) or purpose(s) you choose.
- We'll send you a formal acknowledgment for your records.
- **Broker-to-broker transfers often arrive without donor details, so please let us know about your gift in advance using the form below.**

Please use this form to tell us about your gift:

Date: _____

Donor Name: _____ Broker Name: _____

Fund Name or Purpose of Gift: _____

Name of Stock: _____ # of Shares: _____

Name of Stock: _____ # of Shares: _____

Name of Stock: _____ # of Shares: _____

Please use additional forms as needed if giving more stocks than are listed here.

To ensure your gift is credited promptly, please send us this form before your broker initiates the transaction by emailing giving@napavalleycf.org, calling 707-254-9565, or reaching out to your regular NVCF staff contact.