

HIDDEN VILLA



26870 Moody Road, Los Altos Hills, CA 94022-4209
(650) 949-8652 Fax (650) 948-4159

Gifts of Stock

Thank you for considering a gift of appreciated stock to Hidden Villa. For unrestricted stock there are three ways you can transfer a gift of stock to us:

(1) If the shares are being held by a brokerage firm other than Charles Schwab, please write your broker a letter (**copy to us**) which will include the following information:

A. that you want to make a gift of X shares of X stock to the Trust for Hidden Villa - Tax ID # 94-1539836

B. that you would like said shares to be transferred **via DTC** to Hidden Villa's account at Charles Schwab and Company. **Please call our Development Office (650-949-9702) to obtain our Schwab account number. The Schwab DTC number is 0164 - code 40.**

C. the date you want the shares transferred.

(2) If you have a Charles Schwab account you can write a letter with the above information to your branch (**please copy us**) requesting that Schwab transfer the assets from your Schwab account to our Schwab account (number above).

(3) If you have the stock certificates in your possession you can endorse the back of the stock certificates exactly as they are registered (ie, if husband and wife are both listed on the certificate, both must endorse the back). Send the certificates directly to Hidden Villa via certified mail. In a separate mailing, you will need to mail Hidden Villa a completed and notarized Third Party Release form. We can send or fax you a copy of that form upon request. Any broker can supply that form.

For restricted stock follow points (1) A & C above. Your broker will know how to proceed with that particular stock. If you have any further questions please don't hesitate to give us a call at 650-949-9702. Your generosity is greatly appreciated!

Note: Please notify us regarding the date of the transfer, the name of the stock and the number of shares. Fax, call or send a note, otherwise we can't thank you and send your documentation for taxes. If you have questions please call Charles Schwab at 800-435-4000.



*Inspiring a just and sustainable future through
our programs, land and legacy*

Stock Transfer Authorization Form

Thank you for your donation of appreciated securities to Hidden Villa. To make a gift of stock:

- 1) **Please complete the form below and send it to your broker** to initiate the transfer of securities to Hidden Villa's account.
- 2) **Please notify Hidden Villa.** Hidden Villa will not be notified by either financial institution who requested the stock transfer. Please send a copy of this form or send the date of the transfer, the name of the stock and the number of shares to Sandra Hutchings, Director of Finance. You can send this by mail to Hidden Villa 26870 Moody Road, Los Altos Hills, CA 94022, by email to development@hiddenvilla.org, or by phone at (650) 949-9702. Once transferred to our account, we will make sure the securities are sold immediately and that you are given appropriate credit.


Thank you in advance for your generous support of Hidden Villa!

Your Brokerage Firm

Your Brokerage Firm Address

Your Brokerage Firm City State Zip Code

Please transfer from my account number _____ to:

Charles Schwab and Co., Inc
DTC Clearing No. 0164, Code 40
Brokerage Account # 2577- 6811 
Trust for Hidden Villa - Tax ID # 94-1539836

the following securities:

_____ shares of _____

_____ shares of _____

Or

_____ shares equaling approximately \$ _____

Account Owner Signature

Date

To donate stock certificates in your possession, restricted stock, mutual funds or investments from a trust account, please contact Hidden Villa's Development Team, at (650) 949-9702 or at development@hiddenvilla.org. You can reach Charles Schwab at 1-800-435-4000.

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