



## Gifts of Stock

Thank you for considering a gift of appreciated stock to Hidden Villa.

*In order for us to properly attribute your gift and send you a tax acknowledgement, please let us know your name, address, the name of the security, its ticker symbol, and the number of shares by emailing [development@hiddenvilla.org](mailto:development@hiddenvilla.org) or calling (650) 949-9702. The brokerage is not able to inform us from whom a gift of stock is coming. Your generosity is greatly appreciated!*

**Account Title**

The Trust for Hidden Villa

**Account Number**

2577-6811

**Name of Receiving Institution**

Charles Schwab and Co.

**DTC Number**

0164, Code 40

**Hidden Villa's Tax ID Number**

94-1539836

26870 Moody Rd, Los Altos Hills, CA 94022  
(650) 949-9702 - [development@hiddenvilla.org](mailto:development@hiddenvilla.org)

## Detailed Stock Transfer Instructions

1. If the shares are being held by a brokerage firm other than Charles Schwab, communicate the following information to your broker:
  - a. I would like to make a gift of X shares of X stock to The Trust for Hidden Villa - Tax ID # 94-1539836.
  - b. I would like these shares transferred via DTC to Hidden Villa's account number 2577-6811 at Charles Schwab and Company, DTC number 0164 - code 40.
  - c. I would like these shares transferred on [date].
  
2. If the shares are being held by Charles Schwab, communicate the above information to your branch, requesting they transfer the assets from your Schwab account to The Trust for Hidden Villa's.
  
3. If you have the stock certificates in your possession
  - a. Endorse the back of the stock certificates exactly as they are registered (i.e., if multiple people are listed on the certificate, all must endorse the back).
  - b. Send the certificates directly to Hidden Villa via certified mail.
  - c. Separately, 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 steps A and C for the first option above. Your broker will know how to proceed with that particular stock.

If you have any further questions please don't hesitate to contact the development office at [development@hiddenvilla.org](mailto:development@hiddenvilla.org) or (650) 949-9702.

The phone number for Charles Schwab is (800) 435-4000.

## Stock Transfer Authorization Form

You can use the form below to send to your broker to initiate the transfer of securities to Hidden Villa's account.

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Your Brokerage Firm \_\_\_\_\_

Your Brokerage Firm Address \_\_\_\_\_

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 the development office at (650) 949-9702 or [development@hiddenvilla.org](mailto:development@hiddenvilla.org). You can reach Charles Schwab at (800) 435-4000.*