



## Gifts of Stock to the Hoffman Institute Foundation

Thank you for your interest in donating stock to the Hoffman Institute Foundation. Please pass on the stock delivery instructions to your broker to ensure proper handling. It is also necessary for you to fill out the bottom half of this page and return it to us so that we know the source of the gift and can send you proper acknowledgement.

### Delivery Instructions

Account Name: Hoffman Institute Foundation  
Account Number: 4404-4711  
DTC Number: 0164, Code 40

Contact: Charles Schwab  
Attn: Customer Service  
2423 East Lincoln Drive Phoenix, AZ 85016  
  
1-800-435-4000

### Gift Details

Contact: Branden Barber, Development Director  
Hoffman Institute Foundation  
1299 Fourth St, 6<sup>th</sup> Floor  
San Rafael CA 94901  
  
Ph: 415-526-2964  
Fax: 415-485-5539  
e-mail: [branden@hoffmaninstitute.org](mailto:branden@hoffmaninstitute.org)

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Country: \_\_\_\_\_

Zip: \_\_\_\_\_ Phone: \_\_\_\_\_

E-Mail: \_\_\_\_\_

Name of Stock: \_\_\_\_\_ # of Shares: \_\_\_\_\_

Date of Transfer: \_\_\_\_\_

Fund (general support or restricted): \_\_\_\_\_

*Thank you for your support! Your donation to the Hoffman Institute Foundation is tax-deductible. Please don't hesitate to contact us should you have any questions or require further information.*