UCSF
University of California
San Francisco
advancing health worldwide

UNIVERSITY OF CALIFORNIA SAN FRANCISCO FOUNDATION
STOCK AND MUTUAL FUND DONATIONS

Thank you for your interest in making a gift of stock or mutual fund shares to University of California San Francisco (UCSF) Foundation. We are grateful for your support!

The following transfers are covered by these instructions.

- Transfer of securities held in certificate form
- DTC or electronic transfer of stocks
- Transfer of mutual funds

Please contact us at **(415) 476-3952** if you have questions about these instructions.

TRANSFER OF SECURITIES HELD IN CERTIFICATE FORM IN YOUR NAME

Please contact the UCSF Foundation Gift Administration Team (415-476-3952 or **custsvc@ucsf.edu**) to get more information about the process for transferring securities held in certificate form in your name.

DTC OR ELECTRONIC TRANSFER INSTRUCTIONS

Electronic, or DTC transfer, is the fastest and most secure method for donating securities. It is a two-step process — please notify UCSF Foundation Gift Administration Team by e-mail (**custsvc@ucsf.edu**) or fax (415-476-5083) of your intention to donate securities ***prior to initiating the transfer of securities*** to UCSF Foundation's brokerage account at State Street Global Markets. Prior notification is critical to identifying your gift of securities, as ***donor information does NOT transmit through the DTC system***.

1. Please send a completed **Security Donation Form** to the UCSF Foundation by **fax (415-476-5083) or email (custsvc@ucsf.edu).** This will allow us to instruct State Street Global Markets to accept your gift of securities on behalf of the UCSF Foundation. (Form follows these instructions on page three.)
2. **Broker Instructions** to deliver securities to our broker:

Deliver to	**State Street Global Markets**
DTC #	**0226 NFSC**
Further credit to account	**AB2 037278**
Account name	**UNIVERSITY OF CALI SF FOUNDATION**
Reference*	**John Q. Donor***



*In order to properly credit your donation, it is **very important** that your broker includes **your name** in the reference section of the DTC instructions.

Your donation will not be complete until you notify UCSF Foundation of your intent to donate securities, and until shares are received in UCSF Foundation's State Street Global Markets Brokerage account.

TRANSFER OF MUTUAL FUNDS

Unlike DTC-eligible securities that may be exchanged almost simultaneously between two legal entities, transferring ownership of mutual fund shares requires special handling and can take longer to complete.

1. Please send a completed **Mutual Fund Donation Form** to the UCSF Foundation by **fax (415-476-5083) or email (custsvc@ucsf.edu).** (Form follows these instructions on page four.)
2. Notify your broker or mutual fund company of your intention to donate mutual fund shares to UCSF Foundation.
3. UCSF Foundation will coordinate the process with your broker or mutual fund company.

Your donation will not be complete until shares are received by UCSF Foundation.

CONTACT INFORMATION

If you have any questions or need additional information, please contact:

UCSF FOUNDATION GIFT ADMINISTRATION TEAM

custsvc@ucsf.edu

Telephone: (415) 476-3952

Fax: (415) 476-5083

Thank you for your gift to UCSF Foundation

SECURITY DONATION FORM

Donor Contact Information and Date	
Name	
Address	
Phone	
Email	
Date	
What security are you giving to the UCSF Foundation?	
Issuer	
Number of Shares	
Broker Contact Information	
Broker Contact	
Broker Phone	
What UCSF program would you like your gift to support?	

Fax or email your completed form to:
415-476-5083
custsvc@ucsf.edu

MUTUAL FUND DONATION FORM

Donor Contact Information and Date	
Name	
Address	
Phone	
Email	
Date	
What mutual fund are you giving to the UCSF Foundation?	
Fund Name	
Number of Shares/Units	
Broker/Mutual Fund Contact Information	
Broker/Mutual Fund Contact	
Broker/Mutual Fund Phone	
What UCSF program would you like your gift to support?	

Fax or email completed form to:
415-476-5083
custsvc@ucsf.edu