



San Francisco Botanical Garden Stock Transfer Instructions (May 2020)

Electronically

You can transfer stocks electronically, either personally or through your broker. You will need an account number to make a stock transfer, as well as the Garden broker's information provided here:

Account Name: San Francisco Botanical Garden Society, Tax ID: 94-6050168
Account Number: # 528-113589-053
DTC: #0015
Account Representative: James Lippitt
Morgan Stanley
750 Lindaro St., Suite 300
San Rafael, CA 94901
Telephone: 415-482-1514 Email: james.lippitt@morganstanley.com

Electronic transfers unfortunately do *not* include the name of the donor; therefore, to ensure that we credit you with your donation, be sure to notify us that you have made a gift of stock and provide your full name, the stock name, and the number of shares to: Christopher Minnes (see contact below).

By Mail

To donate stock certificates by mail or in person, please include a letter of instruction with your full name, the stock name, and the number of shares; a signed stock power for each certificate signed exactly as your name appears on the front of the stock certificate and the remainder left blank; and the original stock certificates, unsigned.

Mail certificates (registered mail recommended, with the stock certificate and stock power in two separate envelopes) to: Christopher Minnes, Director of Leadership Giving
San Francisco Botanical Garden Development Office
320 Judah Street, Suite 2, San Francisco, CA 94122
Telephone: 415-661-1316, ext. 312 E-mail: CMinnes@sfbg.org

Valuation and Acknowledgement of Gift

San Francisco Botanical Garden will send an acknowledgment letter for tax purposes, indicating when the shares were received by Morgan Stanley, the name of the stock transferred, and the number of shares in the transaction.

The value of your gift is based on the average of the high and the low of the stock on the date of the gift. The date of the gift is the day the shares reach the Botanical Garden Society's account when transferred electronically; the date you present your stock certificate and stock power in person to SFBG; or the postmark date if you mail your certificate and power, with the exception of if you send by overnight mail, in which case, it is the date SFBG receives the gift.