



## To Make a Gift of Stock

1. Notify SMPLF at [info@smplf.org](mailto:info@smplf.org) or (650) 558-9100 about your gift of stock.
2. Please let us know your name and address, name and number of shares you will be donating, and any designation wishes.

## Receiving Firm Information

**Name and Address**

Charles Schwab & Co., Inc.  
IS Document Control  
PO Box 52144  
Phoenix AZ 85072-2114

**Tax ID Number**

94-1737782

**Overnight Mailing Address**

Charles Schwab & Co., Inc.  
IS Document Control  
2423 E. Lincoln Drive  
Phoenix AZ 85016

**Schwab Clearing**

**Number**  
0164

## For Delivering Firm Use Only

**All DTC-Eligible Securities:** All deliveries MUST include client name and Schwab account number.

Delivery to DTC Clearing 0164, Code 40.

**Dividend Reinvestment or Closed-End Mutual Funds:** All deliveries MUST reference client name and Schwab account number. The client's Schwab account number must not be included in the mailing address. Do not establish an account in the name of Charles Schwab & Co., Inc. FBO (for benefit of) the client.

Issue a certificate for all whole shares, liquidate all fractional shares and discontinue dividend reinvestment.

**Physical Delivery of Checks and/or Securities.** All deliveries MUST reference client name and Schwab account number.

**Name and Address**

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IS Document Control  
PO Box 52144  
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**Overnight Mailing Address**

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2423 E. Lincoln Drive  
Phoenix AZ 85016

**Fed Book-Entry Securities (e.g., Treasury Notes):** All deliveries MUST include client name and Schwab account number.

JPM CHASE/CCC  
ABA #: 021000021  
Charles Schwab A/C G69873  
FBO: 8-digit customer A/C # and name.

**Liquidate Money Fund and transfer cash according to instructions below.**

**Fedwire® Monies:** All deliveries MUST include client name and Schwab account number.

Wire to: Citibank NA. 111 Wall Street, New York, NY 10006

ABA #: 021000089  
FBO: Charles Schwab & Co., A/C #: 40553953  
For further credit to Schwab Client Account #: \_\_\_\_\_

**Foreign Securities.** All deliveries MUST include client name and Schwab account number.

Call 1-602-355-9003 for delivery instructions.

## SMPLF Info:

**Foundation Tax ID: 94-3191775**

55 West Third Avenue  
San Mateo CA 94402  
650.558.9100

## SMPLF Schwab Account Info:

**Account Number: 3281-7152**

**Account Consultant:**

Megan Daylor  
650.358.5530  
[Megan.Daylor@schwab.com](mailto:Megan.Daylor@schwab.com)