OPTIONS FOR GIVING STOCK TO
THE UNIVERSITY OF SAN FRANCISCO

1. ELECTRONIC TRANSFER TO OUR UBS FINANCIAL SERVICES ACCOUNT
This is the most efficient and preferred method for making gifts of stock to USF. Transfer shares through DTC (Depository Trust Company, a clearing house for securities transactions) into the University of San Francisco (USF) account at UBS Financial Services in Menlo Park. Our DTC number is 221 and our account number is KP-33598-60. The UBS account representative is Helene Butler, (650) 289-7053.

It is very important in to notify the USF Stewardship & Donor Engagement Office that the shares are being transmitted through the DTC Process.
If we do not know a transfer is being made, the shares transmitted to the USF account may be held in escrow until the donor is identified. Please use the form on page two below and send to your broker.

2. TRANSFER SHARES TO OUR CHARLES SCHWAB ACCOUNT
If you have a Charles Schwab account, you may ask your Schwab representative to transfer shares directly into USF’s Schwab account using the form on page three below.

IF THE SECURITIES ARE IN YOUR POSSESSION
If you have physical stock certificates, please contact us for special instructions. Do not send certificates directly to USF.

Thank you for your stock gift to USF!

Questions: USF Development
Louise Lucchesi, 1.415.422.6595, llucchesi2@usfca.edu
Michelle Sklar, 1.415.422.6657, msklar@usfca.edu
Department Fax: 1.415.422.2644
2130 Fulton Street, LMR 310A
San Francisco, CA 94117-1080
STOCK TRANSFER LETTER
GIFTS TO USF’S UBS ACCOUNT (All brokers except Charles Schwab)

____________________(Date)

______________________(Name of Broker)

______________________(Address of Broker)

______________________(City, State, Zip)

Dear ____________________:

I am pleased to make a contribution to the University of San Francisco to be used for ______________________________________________________ (gift designation).

Please transfer ______ shares of __________________________ stock from my account #________________to USF via its account at UBS. Transfer information is noted below:

DTC Number 221
UBS Account Number – KP-33598-60
USF Tax Identification Number – 94-1156628

The UBS account contact is Helene Butler, (650) 289-7053

Please inform me when the transfer has been made:

Address __________________________________________________

Telephone #_________________; E-mail: ______________________

Sincerely,

_______________________

(Donor Name & Signature)

**Please also mail, fax or email this form to USF Development (to one of the contacts below). Thank you,

cc: USF Development
Louise Lucchesi, 1.415.422.6595, llucchesi2@usfca.edu
Michelle Sklar, 1.415.422.6657, msklar@usfca.edu
Department Fax: 1.415.422.2644
2130 Fulton Street, LMR 310A
San Francisco, CA 94117-1080
STOCK TRANSFER LETTER – CHARLES SCHWAB ACCOUNTS ONLY

Charles Schwab
P. O. Box 52114
Phoenix, AZ  85072-2114
Office Phone #800-472-9813,  FAX #888-526-7252

ATTN: Schwab Phoenix Operations Center
RE: Journal of assets between accounts

Dear __________________:

I am pleased to make a contribution to the University of San Francisco to be used for the ______________________ (gift designation).

Please transfer _______shares of ______________________ stock from my Charles Schwab account #__________________________to USF via its account at Charles Schwab.

The transfer information is noted below:

USF Charles Schwab Account Number – 8992-3715
USF Tax Identification Number – 94-1156628

Please inform me when the transfer has been made.

Mailing Address: __________________________
E-Mail: ___________________________________
Telephone number: __________________________

Thank you for your immediate attention to this matter.

Sincerely,
______________________________
(donor name and signature)

**Please also mail, email or fax this completed form to one the USF Development contacts below. Thank you

cc:  USF Development
Louise Lucchesi, 1.415.422.6595,  lucchesi2@usfca.edu
Michelle Sklar, 1.415.422.6657,  msklar@usfca.edu
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