

Gift Transfer Instructions for Investment Portfolio A

Gifts of Stock

Silicon Valley Community Foundation is pleased to accept gifts of stock. A stock contribution is valued based on IRS regulations. The value is determined by the mean of the high and the low value of the security on the day that it is credited to a community foundation account or the day that the certificate is in the custody of the community foundation. Contributions sent by U.S. mail are valued the date of the postmark. The community foundation's Federal Tax ID # is 20-5205488. Please fax to 650.450.5401 a copy of your instruction letter to your broker, including your gift purpose, share name and quantity, so that we can track your gift's arrival.

DTC Wire Transfer

Broker: Jamie Ann Lagaret
Tel: 415.627.2867

Banc of America Securities LLC
DTC #0226
For credit to: NFS account P61-101770
Silicon Valley Community Foundation

For the convenience of donors, we maintain accounts with many brokerage firms. Please call the grants and gifts administration department at 650.450.5400 for further information on these accounts.

Delivering or Mailing Stock Certificates

Do **not** sign the certificates. Send them to Silicon Valley Community Foundation unsigned, along with a letter confirming the gift. You will want to include in the letter the specific purpose of the gift.

Send signed stock powers in a separate envelope. The stock powers must be signed exactly as the name(s) appear on the stock certificates. The community foundation will need samples of two signatures from the donor. The signature on the gift letter, as well as the signature on the stock power, will suffice.

Stock Certificates and Stock Powers

Silicon Valley Community Foundation
Attn: Grants & Gifts Administration
2440 West El Camino Real, Suite 300
Mountain View, CA 94040-1498

Mutual Fund Shares

Gifts of mutual fund shares must be transferred directly to a community foundation account within the mutual fund family. Please call the grants and gifts administration department at 650.450.5400 to verify that we have an account or that we can open an account for you.

Gifts of Cash

Cash can be received by wire or check. If you have questions about direct fund transfers, please contact grants & gifts administration at 650.450.5400.

Cash Wire Transfers

Borel Private Bank and Trust Company
160 Bovet Road
San Mateo, CA 94402-3139
ABA No.: 121137797
Account No. 01-014692-01
Beneficiary: Silicon Valley Community Foundation,
Trust 67003795304

Checks

Payable to: Silicon Valley Community Foundation

(Over)

Sample Stock Transfer Letter for Investment Portfolio A

Date: _____

To: _____
Broker's name Address

Brokerage firm City/State/Zip

Phone/Email

RE: _____
Brokerage Account Name and Account Number

Dear Broker:

Effective _____, please transfer _____ shares of _____
(date) (number of shares) (company name)

from my account, referenced above, via the following instructions:

Banc of America Securities, LLC
DTC #0226
For credit to: NFS account P61-101770
Silicon Valley Community Foundation
Attn: Jamie Lagaret 415.627.2867

This transfer represents an irrevocable charitable contribution to Silicon Valley Community Foundation, as of this date, for the benefit of the _____.
(name of fund/project at the community foundation)

Please notify Silicon Valley Community Foundation on the day of the transfer as detailed below. Should there be any questions, you may contact me at _____.
(daytime phone)

Thank you,

Signature

Name (Printed)

Address

City/State/Zip

Please send completed letter to the attention of:

**Grants & Gifts Administration
Silicon Valley Community Foundation**

Fax: 650.450.5401

Email: donate@siliconvalleycf.org