

# THE FUND FOR SANTA BARBARA

## Equity Charitable Contribution Form

**Please submit this form to Marcos Vargas at [mvargas@fundforsantabarbara.org](mailto:mvargas@fundforsantabarbara.org) one week prior to making the transfer to The Fund for Santa Barbara**

### Donor Information:

\_\_\_\_\_  
First Name

\_\_\_\_\_  
Last Name

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip Code

(\_\_\_\_)  
Telephone number

\_\_\_\_\_  
Email address

### Purpose of Gift:

\_\_\_ Annual Fund

\_\_\_ Special purpose: \_\_\_\_\_

### Security Information:

Name of Company Stock	Ticker or Cusip	# of Shares	Brokerage or Bank Name	Approximate Date of Gift

### Delivery Instructions (to be given to Brokerage or Bank delivering securities to the Fund for Santa Barbara) for DTC Eligible Securities

Agent Bank Name:

**U.S. Bank**

DTC Participant Number:

**2803**

FFC:

**1-046XX The Fund for Santa Barbara IMA**

**For questions or concerns regarding the transfer, please contact Jacob Goodkin at 617-726-7237 or at his email address [jgoodkin@bostontrustwalden.com](mailto:jgoodkin@bostontrustwalden.com).**