



Equity Charitable Contribution Form

Please submit this form to Marcos Vargas at mvargas@fundforsantabarbara.org AND to Jacob Goodkin at jgoodkin@bostontrustwalden.com 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: **1-04685 The Fund for Santa Barbara IMA**

For questions or concerns, please contact Jacob Goodkin at 617-726-7237 or at his email address jgoodkin@bostontrustwalden.com.