



## MAKING A GIFT OF STOCK TO SAN FRANCISCO BALLET

Thank you for your generous support of San Francisco Ballet. Please follow the instructions below to ensure your stock gift arrives safely in SF Ballet’s account.

1. Complete this form and submit by mail or email:

**Mail**

San Francisco Ballet  
Attention: Development  
455 Franklin Street  
San Francisco, CA 94102

**Email**

[giving@sfballet.org](mailto:giving@sfballet.org)  
cc: [toby@cald.com](mailto:toby@cald.com)

## DONOR INFORMATION

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
Phone Number

## STOCK INFORMATION

\_\_\_\_\_  
Name of stock(s)

\_\_\_\_\_  
Number of shares

\_\_\_\_\_  
Approximate Value

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

2. Instruct your brokerage firm to transfer the securities via an electronic transfer to SF Ballet’s account at Caldwell Sutter Capital by providing the following information:

**Account Number:** 2748-9658 DTC #0103/CALD

**Representative:** Toby Smith, [toby@cald.com](mailto:toby@cald.com)

**Address:** Caldwell Sutter Capital, Inc.  
30 Liberty Ship Way Suite #3225  
Sausalito, CA 94965

**Tax ID Number:** 94-1415298

# SAN FRANCISCO™ BALLET

**Please Note:**

Electronic stock transfers are not able to provide a donor's name along with the stock. **It is critical that you telephone or email SF Ballet prior to the transfer with the name of the stock and number of shares that you are transferring. Without this information, SF Ballet is unable to recognize the stock as your gift. SF Ballet's broker cannot sell the stock, provide you with appropriate acknowledgement for tax purposes or offer you donor benefits, until you have provided these details.**

If you or your broker has questions or need assistance, please contact [giving@sfballet.org](mailto:giving@sfballet.org) or (415) 865 6621.