



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
cc: 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:

Representative: Toby Smith, toby@cald.com

Account Number: 1JN10163

DTC: 8199

Tax ID Number: 94-1415298

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



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 or (415) 865 6621.