

# Stock Transfers to Donor-Advised Fund

*(Please see separate instructions for transfers for general operating support.)*

## **Instructions**

Thank you for supporting the LGBT community through your Horizons Foundation Donor-Advised Fund. Donating stock or other securities to your donor-advised fund takes just three easy steps.

Please contact Deb Stallings, Director of Development and Gift Planning at 415.398.2333 x103 if you need to make a wire transfer, or have any questions or need additional information.

### **1. Direct your gift to the appropriate account:**

- ELECTRONIC STOCK TRANSFERS:      DTC #0062  
Vanguard Brokerage Services  
Horizons Foundation  
Account # 66069411
  
- PAPER STOCK TRANSFERS:      Vanguard Brokerage Services  
100 Vanguard Boulevard  
Malvern, PA 19355-0741  
Horizons Foundation  
Account # 66069411

### **2. Complete the following information:**

NAME \_\_\_\_\_ PHONE \_\_\_\_\_

COMPANY NAME \_\_\_\_\_ NUMBER OF SHARES \_\_\_\_\_

DATE OF GIFT \_\_\_\_\_

### **3. Notify Horizons:**

It is important that you let us know when you have initiated a transfer stock to Horizons Foundations so we can credit your deposit to the appropriate fund and acknowledge it as quickly as possible.

Please complete this form and return it by fax to 415.398.4733, email to [dstallings@horizonsfoundation.org](mailto:dstallings@horizonsfoundation.org) or mail to: Horizons Foundation 550 Montgomery Street, Suite 700, San Francisco, CA 94111.

For more information please contact Deb Stallings, Director of Development and Gift Planning at 415.398.2333 x103.