

STOCK TRANSFERS TO DONOR-ADVISED FUND

It is very important that you notify Horizons Foundation of any stock transfers to your Fund, as the Foundation does not receive donor information from Vanguard. In order to acknowledge and credit your contribution, we need to know the name and number of any positions you transfer. It can take up to 10 business days for the positions to be sold and the resulting funds deposited into your fund. Horizons liquidates all assets as soon as possible.

Instructions

Thank you for supporting the LGBTQ 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, Vice President of Development 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 daf@horizonsfoundation.org or mail to: Horizons Foundation 550 Montgomery Street, Suite 700, San Francisco, CA 94111.

For more information, please contact Deb Stallings, Vice President of Development at 415.398.2333 x103.