

## GIFTS OF STOCK

A gift of stock is a great way to support The San Francisco School – whether as your Annual Fund gift or as a gift to Endowment or the Capital Campaign. By giving appreciated securities, you receive double tax savings: you can take a charitable deduction for the mean fair market value of the stock on the date of the gift, and you will avoid capital gains tax. (Note: If you have owned the stock for less than one year and one day, it will be considered held for the short-term, and your deduction will be limited to the cost basis. For gifts of closely-held stock, certain appraisal requirements must be met in order to take advantage of the charitable deduction. We suggest that you consult your tax advisor for complete details on the tax implications of your gift.)

## HOW TO TRANSFER STOCK TO THE SAN FRANCISCO SCHOOL

1. Write/email instructions to your broker with a copy of the correspondence directed to:

Director of Institutional Advancement:  
The San Francisco School  
300 Gaven Street  
San Francisco, CA 94134

2. In your instructions, ask your broker to transfer the designated shares to The San Francisco School account at Charles Schwab and Company:  
⇒ #7395-9096  
⇒ DTC# 0164 Code 40

If your account is with Charles Schwab as well, they may call you to confirm your written instructions.

3. Please notify the Advancement Office at 415.239.1475 or [advancement@sfschool.org](mailto:advancement@sfschool.org) to inform that you have sent stock to the school account and please indicate the purposes (annual fund, capital campaign, etc.) and the name of the stock so that we can properly record and acknowledge the gift.
4. If your gift is to the endowment, please mention in your letter whether it is to the general endowment or to a specific fund.
5. Our account is in the San Francisco branch of Charles Schwab, 101 Montgomery Street, SF 94120-0332. Your broker must not sell the assets on your behalf, or you will be liable for the capital gains tax.

6. The school's policy is to sell the shares immediately, with the proceeds supporting the fund you have designated (Annual Fund, Capital Campaign, Endowment).
7. The school receives a monthly statement from Charles Schwab. As soon as your shares appear on the statement, we will send you a thank you letter with the number of shares and the value based on the average of the high and the low for the stock on the day it was received. The monthly statement is the only notification we receive from Schwab. Without prior notification of stock, there may be a time lag of up to a month from the time of your gift before you receive the thank you letter. The monthly statement does not include any donor information. Therefore, the copy of your letter to your broker is the only way we can identify you as the donor of the stock.
8. If you have any questions, please call the Advancement Office at 415.239.1475. Note: If you hold stock certificates that you wish to give to the school, please call Terri Hamer, Chief Financial and Operational Officer at 415.239.1410 to find out how to physically transfer the stock to our Charles Schwab account.

THANK YOU

