

Delivery Instructions For Transfer of Securities

Initiating Transfer

Prior to transfer, please contact **Rebecca Roling**, Vice President of Patron & Community Engagement:

Phone: 805-898-0107 Email: rroling@thesymphony.org

Please inform Rebecca of the following:

- **name** of the stock
- **number of shares** being transferred
- your **broker's name** and phone number
- **date** that the stock transfer is initiated

Transfer of Stock/Equities

Please give the following information to your broker:

Firm Name: **Charles Schwab**
Firm Address: **P.O. Box 628290**
Orlando, Florida 32862-8290
DTC Number: **0164**
Credit Account Number: **7786-0157**
Credit Account Name: **Santa Barbara Symphony Orchestra**

Thank you for your support of the Santa Barbara Symphony.