

Delivery Instructions For Transfer of Securities

Initiating Transfer

Prior to transfer, please contact **Juli Askew**, Development Manager:

Phone: 805-898-8785 Email: jaskew@thesymphony.org

Please inform Juli 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.