

## **GIFTS OF STOCK**

A gift of stock or mutual fund shares is a valuable way to make a contribution to the Santa Barbara Symphony that may provide tax-advantages to some donors. Contact your broker for a full list of tax benefits. Should you decide to make a gift to the Santa Barbara Symphony through this method, please follow the instructions below.

### **Instructions**

Call your broker and express your intent to make a gift to the Santa Barbara Symphony and have your broker contact Juli Askew, Symphony Development Manager at 805-898-8785 or [jaskew@TheSymphony.org](mailto:jaskew@TheSymphony.org)

If you do not have representation, please call the Santa Barbara Symphony Development office directly.

### **Important Information**

In processing your donation, The Symphony office will need the following information:

- a. Name and address of the donor
- b. Name of the stock being donated
- c. Number of shares involved in the transaction
- d. Transaction Date of the gift

**The Santa Barbara Symphony** maintains an account with the brokerage firm listed below. Please use this account for the deposit of your gift.

DTC Number: 0164  
Brokerage: Charles Schwab Investments – Santa Barbara Office  
Account Number: 7786-0157  
Account Name: Santa Barbara Symphony Orchestra Association  
SBS Tax ID: 95-2104089

### **Call our broker**

When you or your broker are ready to make the transfer, please contact our broker at:

Charles Schwab Investments  
900 Chapala Street, Suite 100  
Santa Barbara, CA 93101  
Phone: (805) 884-4201  
Fax: (805) 884-4200