



120 Stony Point Road, Suite 220, Santa Rosa, CA 95401 707.579.4073 sonomacf.org

IMPORTANT! Please call the Community Foundation before each stock gift transfer or gift of stock in certificate form. Stock should not be sold before the transfer of ownership occurs. In order to receive tax advantages, stock must be sold by the Community Foundation.

Please contact our Director of Philanthropic Advising, Kristin Nelson, at knelson@sonomacf.org or (707) 303-9625 to ensure that we know the stock gift is **from you**—it is often difficult to identify the donor in a broker-to-broker transaction. To expedite the process, please let us know your broker's name and phone number when you call.

Community Foundation Sonoma County

DTCC stock transfer instructions for First Republic Securities Company, LLC

Name of Broker/Dealer: First Republic Securities Company, LLC

Name of Clearing Agent: Pershing, LLC

DTCC Number: 0443

Account Name: Community Foundation Sonoma County

Account Number: 33L127074

Contact information for First Republic Securities Company, LLC:

Shannon S. Tan
Client Service – Associate Director
First Republic Investment Management
111 Pine Street
San Francisco, CA 94111
415-249-5578
(f) 415-835-1848
stan@firstrepublic.com

Please contact Shannon Tan for instructions on mutual fund transfers to the Community Foundation Sonoma County.