



120 Stony Point Road, Suite 220, Santa Rosa, CA 95401 707.579.4073 [sonomacf.org](http://sonomacf.org)

**IMPORTANT! Please contact 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 email [stocks@sonomacf.org](mailto:stocks@sonomacf.org) with the number and type of stock you will be donating 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 include your broker's name and phone number, along with the name of the fund you would like to support with your gift.

Thank you for your generosity and commitment to Sonoma County!

## Community Foundation Sonoma County

### DTCC stock transfer instructions for J.P. Morgan Wealth Management

Name of Broker/Dealer: J.P. Morgan Wealth Management

Name of Clearing Agent: Pershing, LLC

DTCC Number: 0443

Account Name: Community Foundation Sonoma County

Account Number: 33L127074

Contact information for J.P. Morgan Wealth Management:

Conrad "Quinn" Gotzian, Client Service Associate

J.P. Morgan Wealth Management

111 Pine Street

San Francisco, CA 94111

347-351-9621

(f) 415-835-1848

[cgotzian@firstrepublic.com](mailto:cgotzian@firstrepublic.com)

Please contact Conrad "Quinn" Gotzia for instructions on mutual fund transfers to the Community Foundation Sonoma County.