



Sonoma Community Foundation
DTC Stock Transfer Instructions for Morgan Stanley

Thank you for your interest in initiating a stock transfer to Sonoma Community Foundation. To ensure a smooth transfer, please follow the steps listed below. Stock should not be sold before the transfer of ownership occurs. To receive tax advantages, the stock must be sold by Sonoma Community Foundation.

Please note: Sonoma Community Foundation (formerly *Community Foundation Sonoma County*) announced a name change in September 2026. Please update your records accordingly for future stock gifts.

Thank you for your generosity!

How to initiate a transfer:

1. Contact stocks@sonomacf.org
2. Provide the number and type of stock you will be donating
3. Include broker contact information
4. Include name of fund you wish to support

Important Information:

Name of Broker/Dealer: Morgan Stanley
Account Name: Sonoma Community Foundation
DTC Clearing Number: 0015
FBO: Sonoma Community Foundation
Account Number: 122-062882

Morgan Stanley Contact:

Andrew R. Aviles
Vice President, Institutional Consulting Analyst
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Please contact Andrew Aviles for instructions on mutual fund transfers to the Sonoma Community Foundation.

Updated September 14, 2026