

UNIVERSITY OF CALIFORNIA SAN FRANCISCO FOUNDATION STOCK AND MUTUAL FUND DONATIONS

Thank you for your interest in making a gift of stock or mutual fund shares to University of California San Francisco (UCSF) Foundation. We are grateful for your support!

The following transfers are covered by these instructions.

- Transfer of securities held in certificate form
- DTC or electronic transfer of stocks
- Transfer of mutual funds

Please contact us at **(415) 476-3952** if you have questions about these instructions.

TRANSFER OF SECURITIES HELD IN CERTIFICATE FORM IN YOUR NAME

Please contact the UCSF Foundation Gift Administration Team (415-476-3952 or custsvc@ucsf.edu) to get more information about the process for transferring securities held in certificate form in your name.

DTC OR ELECTRONIC TRANSFER INSTRUCTIONS

Electronic, or DTC transfer, is the fastest and most secure method for donating securities. It is a two-step process — please notify UCSF Foundation Gift Administration Team by e-mail (custsvc@ucsf.edu) or fax (415-476-5083) of your intention to donate securities **prior to initiating the transfer of securities** to UCSF Foundation's brokerage account at State Street Global Markets. Prior notification is critical to identifying your gift of securities, as **donor information does NOT transmit through the DTC system**.

1. Please send a completed **Security Donation Form** to the UCSF Foundation by **fax (415-476-5083) or email (custsvc@ucsf.edu)**. This will allow us to instruct State Street Global Markets to accept your gift of securities on behalf of the UCSF Foundation. (Form follows these instructions on page three.)
2. **Broker Instructions** to deliver securities to our broker:

Deliver to	State Street Global Markets
DTC #	0226 NFSC
Further credit to account	AB2 037278
Account name	UNIVERSITY OF CALI SF FOUNDATION
Reference*	John Q. Donor*



*In order to properly credit your donation, it is **very important** that your broker includes **your name** in the reference section of the DTC instructions.

Your donation will not be complete until you notify UCSF Foundation of your intent to donate securities, and until shares are received in UCSF Foundation's State Street Global Markets Brokerage account.

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TRANSFER OF MUTUAL FUNDS

Unlike DTC-eligible securities that may be exchanged almost simultaneously between two legal entities, transferring ownership of mutual fund shares requires special handling and can take longer to complete.

1. Please send a completed **Mutual Fund Donation Form** to the UCSF Foundation by **fax (415-476-5083)** or **email (custsvc@ucsf.edu)**. (Form follows these instructions on page four.)
2. Notify your broker or mutual fund company of your intention to donate mutual fund shares to UCSF Foundation.
3. UCSF Foundation will coordinate the process with your broker or mutual fund company.

Your donation will not be complete until shares are received by UCSF Foundation.

CONTACT INFORMATION

If you have any questions or need additional information, please contact:

UCSF FOUNDATION GIFT ADMINISTRATION TEAM

custsvc@ucsf.edu

Telephone: (415) 476-3952

Fax: (415) 476-5083

Thank you for your gift to UCSF Foundation

SECURITY DONATION FORM

Donor Contact Information and Date	
<i>Name</i>	
<i>Address</i>	
<i>Phone</i>	
<i>Email</i>	
<i>Date</i>	
What security are you giving to the UCSF Foundation?	
<i>Issuer</i>	
<i>Number of Shares</i>	
Broker Contact Information	
<i>Broker Contact</i>	
<i>Broker Phone</i>	
What UCSF program would you like your gift to support?	

Fax or email your completed form to:
415-476-5083
custsvc@ucsf.edu

MUTUAL FUND DONATION FORM

Donor Contact Information and Date	
<i>Name</i>	
<i>Address</i>	
<i>Phone</i>	
<i>Email</i>	
<i>Date</i>	
What mutual fund are you giving to the UCSF Foundation?	
<i>Fund Name</i>	
<i>Number of Shares/Units</i>	
Broker/Mutual Fund Contact Information	
<i>Broker/Mutual Fund Contact</i>	
<i>Broker/Mutual Fund Phone</i>	
What UCSF program would you like your gift to support?	

Fax or email completed form to:
415-476-5083
custsvc@ucsf.edu