

## Sample Letter to Banker or Broker – Stock Transfer

Donor Name

Donor Address

Donor City, State, Zip Code

Date

Banker/Broker Name

Company Name

Company Address

Company City, State, Zip Code

Re: Donor Account Number

Dear **(Banker Salutation)**:

I would like to make a donation of **(insert number of)** shares of **(insert stock name)** common stock to the Marin Symphony Association's Annual Fund.

Please transfer these shares from my account number: **(insert account number)** to the Marin Symphony (a not-for-profit corporation, tax identification number 94-6104150) on or before **(insert date)**.

The instructions for transferral are, as follows:

Broker Name: Charles Schwab & Co.

Account Name: Marin Symphony Association

Account #: 8753-1984

DTC #: 0164

If you have any questions about this transfer of stock, please call Nuri Kye, Director of Development at the Marin Symphony, at 415.479.8100 or email [nuri@marinsymphony.org](mailto:nuri@marinsymphony.org).

Thank you for your prompt attention to this request.

**(Donor Signature)**

**(Donor Name)**

cc: Nuri Kye, Director of Development  
Marin Symphony Association  
4340 Redwood Hwy, Ste 490C  
San Rafael, CA 94903