

# Stock Transfer Instructions



Please use this form to transfer stock to the Volunteer Center of Santa Cruz County.

**Important! Before transferring stock, please email this form to [engagement@scvolunteercenter](mailto:engagement@scvolunteercenter), or call us so we can complete it with you.  
Leslie Lee (831)-535-8388 or Karen Delaney (831)427-5070**

The Volunteer Center uses the firm “Pershing LLC” to handle all electronic transfers of stock gifts. Please share this information with your broker:

1. *The Receiving Account Registration: Volunteer Center of Santa Cruz County*
2. *The account number for gifts is 4QK108453*
3. *The DTC number for Pershing LLC is 0443*
4. *Please have your broker include your name and contact information when making the transfer.*
5. *The Volunteer Center’s contact for the donation account is Kerri Berry, of Beach House Wealth Management, who may be reached at (831) 426-3100, extension 3.*

Pershing does not automatically notify the Volunteer Center of new stock deposits, please contact us before transferring any stock. For help or questions, please contact Leslie Lee (831)-535-8388 or Karen Delaney (831)427-5070.

## DONOR CONTACT INFORMATION

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First Name

Last Name

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Address

City

State

Zip Code

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Home Telephone Number

Cell Phone Number

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Email Address

**Please check here if you would like your gift to be anonymous**

# of shares:

Name of Stock:

Transfer date:

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