Securities Transfer Request Form

*Shares can be transferred directly from your brokerage account to The Conservancy’s account. Complete the form below and send one copy to your broker and email one to The Conservancy at sdrvc@sdrvc.org.*

*Please call (858) 755-6956 or email sdrvc@sdrvc.org with any questions you may have.*

Date: ______________________

To: _________________________ (Your Broker’s Name)
    _________________________ (Brokerage Firm)
    _________________________ (Broker’s Phone Number)

**Please accept this letter as your authorization to irrevocably transfer:**

Name of stock: _________________________ Number of shares: _________________________

Which you hold in the name of: _________________________
(Account title at brokerage firm, e.g. John Smith Family Fund)

From (your) account number: _________________________

Signature(s) of account owner(s): _________________________

**Please transfer to The Conservancy’s account at The Union Bank of California, UBOC Investment Services as follows:**

Account Name: San Dieguito River Valley Conservancy
Brokerage Company: UBOC Investment Services
DTC#: 226
Account #: 0BP-362190
Phone: 1-800-634-1100
Tax ID #: 33-0191772

For acknowledgement of the gift, please list my/our name(s) as follows:

________________________________________________________________________

________________________________________________________________________

This gift is designated for: General support
Other (please specify program) ______________________________________________________________________________________________________