

## California Symphony Stock Transaction Form

Thank you for making a gift of stock to the California Symphony Orchestra, Inc. Please complete this form and mail or fax it to the California Symphony with each gift. Also, please attach a copy of any correspondence you have with your stockbroker regarding this gift.

MAIL: California Symphony Orchestra, Inc.  
ATTN: Noralee Rockwell  
877 Ygnacio Valley Rd., Ste 200  
Walnut Creek, CA 94596

FAX: 925.280.2494

Please provide your stockbroker with the following information:

**DTC #0141 account # 1763-9020**

*For credit to:* California Symphony Orchestra, Inc.

*Contact:* Wells Fargo Advisors, Sandra Crook (800.888.4299)

Donor Name: \_\_\_\_\_

Transaction Date: \_\_\_\_\_

Stockbroker Name: \_\_\_\_\_

Stockbroker Telephone Number: \_\_\_\_\_

Stock Name: \_\_\_\_\_

Number of Shares: \_\_\_\_\_ Approximate Gift Value: \_\_\_\_\_

**I would like this gift to be directed to (please check one):**

- I would like to waive all non-tax-deductible benefits and receive full charitable value for my gift.**
- Major Gifts**
- California Symphony Endowment Fund**
- Other – please explain** \_\_\_\_\_

\_\_\_\_\_  
**DONOR SIGNATURE**

\_\_\_\_\_  
**DATE**

\_\_\_\_\_  
**Telephone Number**

Please mail or fax to the California Symphony Orchestra, Inc. **Thank you for your support.** You will receive a tax receipt for your records once the stock has been received and sold.

If you have any questions, please contact Noralee Rockwell, Finance Director, at 1.925.280.2490 or [nrockwell@californiasymphony.org](mailto:nrockwell@californiasymphony.org)