

# MAKING A STOCK GIFT TO SFJAZZ

Thank you for your interest in making a gift of stock to SFJAZZ. Please use the following instructions to ensure the stock is properly received into our account.

1. You should instruct your brokerage firm to transfer the securities via an electronic transfer to the SFJAZZ account at Wells Fargo.

**Brokerage firm:** First Clearing/Wells Fargo Advisors  
**DTC#:** 0141  
**Credit to account number:** 7304-7576  
**Account name:** San Francisco Jazz Organization

**Representative:** Melody Wiley  
 Senior Registered Client Assistant  
 Wells Fargo Advisors  
 555 California Street, Suite 2300  
 San Francisco, CA 94104  
 (415) 395-2539  
 (800) 634-4965  
 melody.wiley@wellsfargoadvisors.com

San Francisco Jazz Organization (SFJAZZ) is a 501(c)(3) non-profit organization.  
 Tax ID: 94-2990335

2. Correspondence regarding the transfer should be sent to the SFJAZZ Development Office at [lcmanager@sfjazz.org](mailto:lcmanager@sfjazz.org).
3. Electronic stock transfers are not able to provide a donor's name along with the stock. **It is critical that you email SFJAZZ prior to the transfer with the name of the stock and number of shares that you are transferring so we may properly attribute the gift to you.** Please also inform SFJAZZ of any restrictions on the gift.

You may fill out the fields below and send this form to [lcmanager@sfjazz.org](mailto:lcmanager@sfjazz.org)

<input type="text"/>	
Donor name	
<input type="text"/>	
Name of stock	
<input type="text"/>	
Number of shares	
<input type="text"/>	
Approximate value	
<input type="text"/>	
Gift purpose	
<input type="text"/>	
Date	<input type="checkbox"/> Decline benefits

**Questions?** Contact Leaders Circle Manager at [lcmanager@sfjazz.org](mailto:lcmanager@sfjazz.org)

SFJAZZ Center 201 Franklin Street San Francisco, CA 94102 | [SFJAZZ.ORG](http://SFJAZZ.ORG)