



# San Francisco Community Clinic Consortium

1550 Bryant Street, Suite 450, San Francisco, CA 94103 (415) 355-2222 (415) 865-9960 FAX

## Policy and Procedure for Stock Gifts

### Overview

Some donors may choose to support the San Francisco Community Clinic Consortium by donated gifts of appreciated securities. In addition to providing crucial financial support for communication and advocacy, a donor can generally receive a two-fold tax savings. First a donor can avoid paying any capital gains tax on the increase in the value of the stock. Second, the donor receives an income tax charitable deduction for the full fair market value of the stock at the time of the gift. An individual can donate securities by transferring stock certificates or through their broker.

SFCCC will use the proceeds from the sale of the stock gift to support our ongoing work and to build our cash reserves.

### Stock Certificates

To contribute by transferring stock certificates, a donor needs a stock power for each one he/she plans to donate. These stock powers must be signature guaranteed. A local bank or broker can witness the signature and stamp it accordingly.

Once a donor has signed the powers (not sign the back of the certificates), the certificates are mailed in one envelope. The signed stock powers with the signature guarantee are placed in a separate envelope. Then, both envelopes are mailed to:

SFCCC  
Attn: President / CEO  
1550 Bryant Street  
Suite 450  
San Francisco, CA 94103

NOTE: We recommend use of certified mail with return receipt.

### Stocks Held Through Your Broker

There are three simple steps to follow for you to transfer stock through your broker to the SFCCC. Using the sample letter below, you can simply provide the information to your broker or have your broker call our offices at (415) 355-4245 for the information.

Also, please ask your broker to contact Eddie Zalayet at 800-634-4965 or 415-291-1200 before transferring any securities. This will ensure that our broker is aware of your gift and is actively looking for it.

**Three simple steps:**

1) Instruct your broker by phone or use the Request of Transfer sample letter (#1) provided below, to perform a "electronic transfer" of the shares you wish to give. Your broker will need the following information about SFCCC stock/ brokerage account:

Wachovia Securities  
Attention: Eddie Zalayet  
Telephone: 800-634-4965 or 415-291-1200  
Brokerage DTC Number: 0030  
Account # BSY-083871-62  
Account Name: San Francisco Community Clinic Consortium  
Tax ID # 94-2897258

2. Inform SFCCC that the transfer has been made by sending the Notice of Pending Stock Gift sample letter (#2) so that the SFCCC development staff can acknowledge your gift and follow through to complete the transaction. Please include the date of transfer, the name of the stock, and how many shares we should expect.

3. Once transaction is complete you will receive a receipt from SFCCC for the tax purposes.

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**Sample Letter #1, REQUEST OF TRANSFER OF SECURITIES FOR CHARITABLE GIVING**

Date \_\_\_\_\_

Dear Broker,

With this letter I am instructing you to transfer the below listed shares from my account, to the account of the San Francisco Community Clinic Consortium. I am making this transfer as a charitable donation to the Consortium.

Here is the information you will need:

From my account:\_\_\_\_\_

Name of stock(s) to be transferred \_\_\_\_\_

Number of shares:\_\_\_\_\_

To Wachovia Securities in the name of:

San Francisco Community Clinic Consortium

Attention: Eddie Zalayet  
Telephone: 800-634-4965 or 415-291-1200  
Brokerage DTC Number: 0030  
Account # BSY-083871-62  
Account Name: San Francisco Community Clinic Consortium  
Tax ID # 94-2897258

Please inform me to confirm when this transfer has been completed.

Sincerely,

Your name

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**SAMPLE LETTER #2, NOTICE OF A PENDING GIFT OF STOCK**

Date \_\_\_\_\_

John Gressman  
President / CEO  
San Francisco Community Clinic Consortium  
Suite 607  
1388 Sutter Street  
San Francisco, CA 94109

Dear Mr. Gressman:

With this letter I am alerting you to a gift of stock I have transferred to the account of SFCCC at Wachovia Securities: SFCCC Stock Account # BSY-083871-62.

Here is the information you will need:

From my account at "Name of Broker/Company"

Name of stock(s) transferred \_\_\_\_\_

Number of shares \_\_\_\_\_

Date of Transfer \_\_\_\_\_

Please send me a letter of confirmation when you have received this gift.

Sincerely,

Your Name and Address