

## Stocks and Securities Donation Form

A charitable gift of stock provides a potential opportunity for tax savings while generously supporting Planned Parenthood: Shasta-Diablo. Electronic delivery of stock shares is the most secure and expedient delivery process available and provides efficient internal control as well as cost savings to us. However, you may also transfer certificates directly.

Regardless of the method chosen to deliver a gift of stock, the donor or the transferring broker must provide the following information to us, for audit and acknowledgement purposes:

- Donor's name, complete address, phone number and email address
- Name and number of securities transferred
- Broker's name and phone number
- Approximate dollar value of gift

You may fill out our on-line stock donation form or print, complete, and fax or mail this stock donation form. You can also provide a letter, or send an e-mail to communicate this information at time of transfer to:

**Planned Parenthood: Shasta-Diablo  
Development Department**

2185 Pacheco Street  
Concord, CA 94520  
info@ppshastadiablo.org  
925.676.0505 (Phone)  
925.676.2814 (Fax)

**Securities Delivered Electronically**

Your broker will need the following information to facilitate an electronic transfer of stock:

**PPSD Brokerage:**

Sanford C. Bernstein & Co., LLC  
One North Lexington Avenue  
White Plains, NY 10601-1785

DTC Number: 0013

Account #: 039-47743

Account Name: PLANNED PARENTHOOD SHASTA-PACIFIC  
(Legal Name: Planned Parenthood: Shasta-Pacific; Tax ID: 94-1575233)

Contact: James Lloyd  
Phone: 415-217-8035

**Securities Delivered by Mail**

You can forward your stock certificate(s) directly to Planned Parenthood: Shasta-Diablo. Mail your unendorsed certificate(s) and stock power form, in separate envelopes to:

Planned Parenthood: Shasta-Diablo  
Development Department  
2185 Pacheco Street  
Concord, CA 94520

**We recommend that certificate(s) be sent via registered mail.**

If you have questions about making a stock or securities donation to Planned Parenthood: Shasta-Diablo, please contact the Development Department at 925.676.0505 or info@pp-sp.org.

# Stock Donation Form

**DONOR INFORMATION:**

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

Street Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Email: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_ Evening Phone: \_\_\_\_\_

Check this box if you wish for this gift to be anonymous

**GIFTED STOCK DESCRIPTION(S):**

Name(s) of security(ies) donated: \_\_\_\_\_

Approximate Number of Shares: \_\_\_\_\_

Approximate Transfer Date: \_\_\_\_\_

Approximate Dollar Value of Gift: \_\_\_\_\_

Transferring Broker's Name and Firm: \_\_\_\_\_

Transferring Broker's Phone: \_\_\_\_\_

**Additional Information:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
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