



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 fax one to The Conservancy at (858) 356-4222. 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 #: OBP-362190

Phone: 1-800-634-1100

Tax ID #: 33-0191772

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

Address: _____

This gift is designated for: General support

Other (please specify program) _____