



## 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 email one to The Conservancy at [sdrvc@sdrvc.org](mailto:sdrvc@sdrvc.org).*

*Please call (858) 866-6956 or email [sdrvc@sdrvc.org](mailto: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 #: 0BP-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) \_\_\_\_\_