



## Stocks and Mutual Fund Donation Form

### Important Information:

- Name of Account: Agua Hedionda Lagoon Foundation
  - Lisa Rodman, CEO
  - 1580 Cannon Road, Carlsbad CA 92008
  - (760) 804-1969
  - [lisa.rodman@aguahedionda.org](mailto:lisa.rodman@aguahedionda.org)
- Name of Broker: Stifel
  - Gary P. Endres, Stifel, First Vice President/Investments Branch Manager
  - 5780 Fleet Street, Suite #250 Carlsbad, CA 92008
  - Phone: (760) 804-3400; Direct: (760) 804-3404
  - Email: endresg@stifel.com
- DTC #: 793
- Account #: 3998-6344
- Tax ID #: 33-0411888

### Steps:

Step 1: Complete the below Form.

Step 2: Send the completed form to your Broker and a copy to the AHLF.

- *If you would like our broker (Stifel) to reach out to your broker, please call your broker ahead of time, to let them know a representative from the AHLF will be reaching out in regards to the gift of stock.*
- *When the gift of stock is complete, AHLF will send a tax-deduction letter to you.*

<b>Name</b>		
<b>Street Address</b>		
<b>City</b>	<b>State</b>	<b>Zip</b>
<b>Email</b>		
<b>Does the Donor Wish to Remain Anonymous</b>	<b>Yes</b>	<b>No</b>
<b>Desired Date of Transfer</b>		
<b>What is the approximate value you would like to donate (in dollars and cents):</b>		
<b>Number of Shares</b>		
<b>Ticker Symbol (1 to 6 characters)</b>		
<b>Name of Security</b>		
<b>What is the name of your Broker?</b>		
<b>What firm is the Broker with?</b>		
<b>Firm Phone Number:</b>		

*As always, we recommend that you consult a tax professional with any specific questions.*