



PASADENA COMMUNITY FOUNDATION  
*Building Hometown Legacies*

**Charles Schwab Securities Transfer Information**

Dear Donor:

Thank you for your donation. Please help us with the following to ensure that the transfer of your securities to the Pasadena Community Foundation goes smoothly.

1. Please provide the following information to your broker to transfer your securities, as a gift donation to the Pasadena Community Foundation.

Name of Account: **Pasadena Community Foundation**  
Account No. : **1155-1403**  
DTC Clearing No.: **0164**

**2. Please call (or fax/email/mail) the Pasadena Community Foundation and let us know the following:**

(a) Your name/fund (donor); (b) Shares transferred; (c) Number of Shares transferred;  
(d) Date transferred; and (e) Brokerage firm that executed the transfer.

3. Please note that it could take up to several business days for the transactions to be completed:

a. DTC transfer takes up to three business days from **the date your broker executes the transfer** for the securities to be transferred to the Foundation's account.

b. Sale and settlement of securities takes another three business days **from the date Pasadena Community Foundation executes the sale of the transferred securities** for the sale to be completed and funds transferred to the Foundation's Charles Schwab account.

c. Year-end processing of securities require additional time since the DTC and brokerage firms usually have a larger volume of transactions during the holiday season.

**Please send written notification of stock transfers by mail, email or fax to:**

Attn: Jennifer Clark  
Donor Relations Associate  
Pasadena Community Foundation  
301 E. Colorado Blvd. Suite 810  
Pasadena, CA 91101

Email: [jclark@pasadenacf.org](mailto:jclark@pasadenacf.org)

Phone: (626) 796-2097 x 3

Fax: (626) 583-4738