PASADENA COMMUNITY FOUNDATION
FOR A GREATER PASADENA AREA

Charles Schwab Stocks/Securities Transfer Instructions

Thank you for your belief in the Pasadena Community Foundation (PCF). Help us with the following to ensure that the transfer of your stocks/securities to PCF is delivered properly and efficiently.

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

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

PLEASE READ:

2. Before you initiate the stock transfer, please email/mail/or fax a written note to Jennifer Clark at the Pasadena Community Foundation and let us know the following or please request your financial broker/advisor to send the written message to Jennifer Clark on your behalf. (NOTE – Charles Schwab does not send PCF this information):

(a) Your full name as the Donor (include all names who should be recognized as the donors if more than one),
(b) Your mailing address, email address & phone number,
(c) Name of the fund at PCF where to deposit it into,
(d) Name of Stocks/Shares to transfer,
(e) Number of Shares to transfer,
(f) Date of transfer, and
(g) Brokerage firm that will execute the transfer.

3. Please note that it could take up to several business days for the transactions to be completed:
   a. DTC (Depository Trust Company) 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 transferred to PCF'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.

Prior to sending the Stocks/Securities, please send written notification of stock transfers by mail, email or fax to:

Attn: Jennifer Clark
Gift & Operations Associate
Pasadena Community Foundation
301 E. Colorado Blvd., Suite 810
Pasadena, CA 91101

Email: jclark@pasadenacf.org
Phone: (626) 796-2097 x 103
Fax: (626) 583-4738

PCF – 7/16/26