

STOCK TRANSFER GUIDELINES

Types of Transfers: You can transfer publicly traded stock to the San Luis Obispo Museum of Art in three ways.

1. Broker Transfer

First, ask your broker to contact SLOMA's Administrative Assistant (805-543-8562 or visit sloma.org/contact) to alert them of the transfer of a specific number of shares of stock or publicly traded security to the San Luis Obispo Museum of Art's account at Vanguard. Please note that most brokers require that this be in writing. *This is an important step as most broker transfers do not include the donor's name, which is required for the stock sale and for your recognition as a donor!*

In your communications with SLOMA, please confirm if/how you would like to be recognized for your donation (e.g. "John and Jane Doe," "The Doe Family," or "Anonymous") and whether this gift is in honor or memory of someone.

Additional information for your broker: only send security certificates by registered or certified mail, and **deliver shares to DTC Broker #0062, Vanguard brokerage services F/C/A 50935314**

For registered or certified mail:
Vanguard Brokerage Services
455 Devon Park Drive
Wayne, PA 19087-1815

2. Direct Transfer

Bring your stock certificate to the San Luis Obispo Museum of Art, signing the certificate on the reverse side and dating it. Fill in the name of the transferee (San Luis Obispo Museum of Art) and the Museum of Art's Fed Tax ID number (#95-6134270)

3. Certificate transfer with accompanying stock power.

Send your unsigned stock certificates to:
San Luis Obispo Museum of Art,
PO Box 813
San Luis Obispo, CA 93406.

In a separate envelope, send a signed stock power, indicating San Luis Obispo Museum of Art as the transferee and the San Luis Obispo Museum of Art's Fed Tax ID number (#95-6134270) in the appropriate place.

The date of transfer, by legal definition the date you relinquish control, and not the date you instruct your broker, will establish the valuation date of your gift. We will acknowledge all gifts in writing.