



SAN FRANCISCO BALLET
HELGI TOMASSON, ARTISTIC DIRECTOR

MAKING A GIFT OF SECURITIES TO SAN FRANCISCO BALLET

Thank you for your support of San Francisco Ballet. The following instructions should be followed to ensure that the gift of securities arrives safely into the Ballet's account.

1. You should instruct your brokerage firm to transfer the securities via an electronic transfer to the Ballet's account at Caldwell Sutter Capital:

DTC #0103/CALD

For further credit to the account of San Francisco Ballet Association, A/C 2748-9658

2. Correspondence regarding the transfer should be sent to the Ballet's Development Office. Copies should be sent to the Ballet's brokerage firm as follows:

Mail

Caldwell Sutter Capital, Inc.
ATTN: SF Ballet Donations
30 Liberty Ship Way
Suite #3225
Sausalito, CA 94965

Email

Toby Smith
toby@cald.com

3. Electronic stock transfers are not able to provide a donor's name along with the stock. **It is critical that you telephone or email the Ballet prior to the transfer with the name of the stock and number of shares that you are transferring. Without this information, the Ballet will not recognize the stock as your gift. The Ballet's broker cannot sell the stock, and the Ballet cannot provide you with appropriate acknowledgement for tax purposes or offer you donor benefits, until you have provided these details.** At the same time, you should also inform the Ballet of any restrictions on the gift.

To provide details of your stock transfer, or if you or your broker have questions or need assistance, please contact:

- Giving@sfballet.org or 415.865.6628

Thank you for your generous support of San Francisco Ballet.