

— FESTIVAL — MOZAIC

Gifts of Stock and Securities to Festival Mozaic

Thank you for your support of Festival Mozaic. The following instructions should be followed to ensure that your generous gift of securities arrives safely into Festival Mozaic's account.

1. You should instruct your brokerage firm to transfer the securities via an electronic transfer to Festival Mozaic's account **in the name of Mozart Festival Association** at:

Charles Schwab & Co., Inc.
733 Marsh Street, Suite #100
San Luis Obispo, CA 93401-3901

DTC#:	0164
Code:	40U
Brokerage Firm:	Charles Schwab & Co., Inc.
Credit Account	Mozart Festival Association dba Festival Mozaic
Credit Account	6506-5168
Contact Person	Jim Hamari
Contact Phone	800-435-4000 (Main Schwab line)

2. Correspondence regarding this transfer should be sent to the Festival's Executive Director, Lloyd Tanner - lloyd@festivalmozaic.org

3. **Electronic stock transfers are not able to provide a donor's name along with the stock.**

- It is critical that you or your broker complete page 2 of this document and return to the Festival by email prior to the transfer - lloyd@festivalmozaic.org
- Without this information, the Festival is not able to recognize the stock as your gift. The Festival's broker cannot sell the stock and the Festival cannot provide you with appropriate acknowledgement of your gift for tax purposes or offer you donor benefits without these required details.
- At the same time, you should also inform the Festival office of any restrictions on the gift.

Thank you!

Gifts of Stock and Securities to Festival Mozaic

Name of Donor: _____

Please transfer the following shares of stock:

Number of shares: _____

Stock name: _____

Stock symbol: _____

Deliver to:

Charles Schwab & Co., Inc.
733 Marsh Street, Suite #100
San Luis Obispo, CA 93401-3901

DTC#: 0164
Code 40U

In the name of: Mozart Festival Association dba Festival Mozaic
Account #: 6506-5168

Contact Person: Jim Hamari
Contact Phone: 800-435-4000 (Main Schwab line)

Please include any restrictions on this gift:

Please return a copy of this form to the Festival Mozaic office at lloyd@festivalmozaic.org