



SACRAMENTO
STATE

**The University Foundation
at Sacramento State**

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capradio

DTC STOCK TRANSFER INSTRUCTIONS

CAPITAL PUBLIC RADIO (CAPRADIO) IN PARTNERSHIP WITH
THE UNIVERSITY FOUNDATION AT SACRAMENTO STATE (UFSS)

STEP 1: Direct your broker to transfer shares electronically using the following transfer delivery instructions:

Brokerage Firm: Charles Schwab & Co.

DTC Number: 0164-Code 40

Account Number: 4018-2828

Account Name: University Foundation at Sacramento State

Reference: (Donor name & purpose of gift) ****without this note, gifts can be difficult to identify****

STEP 2: Please notify Jennifer Halm, Senior Director of Development at CapRadio, about your gift by phone at (916) 278-8975 or by e-mail at jennifer.halm@capradio.org. Please include the following:

- Your Contact Information (Full Name, Address, Phone Number and Email)
- Name of Security
- Number of Shares
- Purpose/Designation of the Gift
- Name of Brokerage/Custodian Bank
- Anticipated Date of Transfer

Once confirmed, Capital Public Radio (CapRadio) will work with the Office of Planned Giving at Sacramento State to process your gift. Both CapRadio and the University Foundation at Sacramento State (UFSS) are auxiliaries of Sacramento State. The primary role of UFSS is to accept, process, and distribute philanthropic gifts. While your gift is technically being made to UFSS, all gifts will be routed to directly benefit CapRadio.

PLEASE NOTE: Your gift will be dated according to the day the shares enter Sac State's account at Charles Schwab. The value of your gift will be based on that date. At busy times of the year, the DTC system can back up. **For year-end gifts**, be sure to allow extra time for the transfer from your broker's account to Sac State's Charles Schwab account, and emphasize to your broker the importance of completing the transfer by December 31. When the 31st falls on a weekend, the transfer should be completed by the preceding Friday.

Thank you for your generous support.

* The University Foundation at Sacramento State (UFSS), formerly the CSUS Trust Foundation, is a nonprofit, IRS designated 501(c)(3) organization established in 1986 as the philanthropic arm of the University to promote, assist, and enhance the educational mission of Sacramento State. All gifts in support of the goals, missions, and programs of Sacramento State (including all colleges, schools, academic, and non-academic units and auxiliaries) are received and deposited through the Foundation. Donors may give gifts to The University Foundation at Sacramento State for specific University purposes, and may obtain tax benefits in accordance with State of California and United States Federal laws. **Federal tax ID number: 94-3001359.**