



## Transfer Instructions for Gifts

Please notify Homeward Bound whenever you intend to transfer a gift so that we know who to credit the donation to – we don't always get this information from Charles Schwab.

You can e-mail Paul Fordham at [pfordham@hbofm.org](mailto:pfordham@hbofm.org) to let us know.

## Instructions for Gifts of Stock

Please fax or email a copy of the instructions that you give to your broker. Address this to:

**ATTN: Homeward Bound Stock Transfer**, and fax to (415) 382-6010 or email to [info@hbofm.org](mailto:info@hbofm.org)

The letter of instruction should include your name and a description of the security (e.g. 100 shares of XYZ Corporation common stock).

To facilitate your gift of stock, please transfer securities to Homeward Bound's brokerage account at

**Charles Schwab:**

Charles Schwab  
P.O. Box 52114  
Phoenix, AZ 85072  
Stock Company Phone #: (800) 435-4000

Account #: 9918-4666  
DTC #: 0164, CODE 40

Official Account Name: **HOMEWARD BOUND OF MARIN**

If you hold the stock certificate you wish to donate, you may either deliver it to Homeward Bound along with a signed stock power, or mail it. Please send the signed stock power under separate cover to:

Homeward Bound of Marin  
*ATTN: Finance & Administration*  
1385 North Hamilton Parkway  
Novato, CA 94949 - 8276

**Homeward Bound's Tax ID Number is 68-0011405**