



**Rancho Santa Fe**  
**FOUNDATION**  
NORTH COUNTY'S HOME FOR IMPACTFUL GIVING

**BROKER INSTRUCTIONS to TRANSFER STOCK**

To: \_\_\_\_\_  
(Name of Donor's Broker)

Please accept this as my instruction to transfer # \_\_\_\_\_ shares of  
(Name of stock) \_\_\_\_\_  
(common) / (preferred) from account # \_\_\_\_\_  
to the following:

UBS Financial Services, Inc. – DTC #0221  
Attention: Stephen Seiber  
1200 Prospect Street, Suite 500  
La Jolla, CA 92037

For the Benefit of: Rancho Santa Fe Foundation  
Account #: VR-34510-12  
For Credit to: \_\_\_\_\_

(Name of Fund at RSFF)

Thank you for your attention to this matter.  
Sincerely,

Donor Name \_\_\_\_\_ Date \_\_\_\_\_  
Address \_\_\_\_\_  
City, State, Zip \_\_\_\_\_

\_\_\_\_\_  
Donor Signature

**Note to Donor: Please send a copy of this transfer form to the following at the same time that you submit to your broker. Rancho Santa Fe Foundation will not be responsible for securities or the losses that may accrue to them if we are not immediately notified of your transfer. Thank you.**

Cc: Mr. Stephen Seiber  
UBS Financial Services, Inc.  
1200 Prospect Street, Suite 100  
La Jolla, CA 92037  
Phone: 800-231-9628  
Fax: 858-551-0748  
[stephen.seiber@ubs.com](mailto:stephen.seiber@ubs.com)

Nicole Demers Tubbs, Finance Director  
Rancho Santa Fe Foundation  
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