



Securities Gift Form

Thank you for making a gift of securities to the Women's Fund of Santa Barbara!

Our brokerage house and account number:

- **Transfer Agent:** LPL Financial DTC#0075
- **Account Name:** Women's Fund of Santa Barbara
- **Account Number:** 19650587
- **On behalf of:** Montecito Bank and Trust Advisors
1000 State Street, Santa Barbara, CA 93101
- **Contact:** Jorge Morales, (805) 564-7305 or jmorales@mbtadvisors.com

Please provide the following information so that your gift is properly processed and acknowledged.

This is a fillable form. Use the TAB key to move between fields.

DONOR INFORMATION

Name of Donor(s)
Email
Mailing Address
Contact Phone Number(s)
Women's Fund Group (if appropriate)

SECURITIES INFORMATION

Name of Securities	Symbol
Number of Shares	
Estimated Date of Transfer	

Please send this completed form by email to: finance@womensfundsb.org or by mail to: Women's Fund of Santa Barbara, 133 E. De La Guerra St., #15, Santa Barbara, CA 93101.

If you have additional questions, please call (805) 303-1205 or email finance@womensfundsb.org.