



## Gift of stock to the Climate Action California Foundation

When you give stock or other securities to the Foundation, you receive an income tax deduction for the current market price of the stock, and we put the value of the stock to work for the climate!

[Stifel](#) accepts and processes gifts of stock to the Climate Action California Foundation, a 501(c)(3) charity.

To transfer stock:

**1. Instruct your broker to transfer stock or other securities as follows:**

Receiving bank/broker: Stifel

DTC #793

Account name: Climate Action California Foundation

Account number: 3740-2529

**2. Please send an email to our Treasurer, Pat Kinney, at [Treasurer@climateactionca.org](mailto:Treasurer@climateactionca.org), noting**

- The number and type of shares you will donate
- Your broker's name and phone number
- Approximate date of the transfer

**If you have questions about the transfer, please reach out to**

Paul K. Kim, AAMS®, AWMA®

Branch Manager | Senior Vice President/Investments

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