

**SAMPLE OF LETTER OF INSTRUCTION TO BROKER TO TRANSFER STOCK TO THE UC SAN DIEGO FOUNDATION**

*Donor Name(s)*  
*Address*  
*Telephone Number*

<date>

name of broker  
address

RE: Letter of Instruction to transfer securities

Dear \_\_\_\_\_:

I wish to irrevocably contribute [insert number of shares or dollar amount] of [insert stock name] common stock to the U.C. San Diego Foundation as a [pledge payment towards \_\_\_\_\_; or a an outright gift towards \_\_\_\_\_]

Please transfer theses shares from my Account Number: #\_\_\_\_\_ to the U.C. San Diego Foundation in La Jolla, California (a California not for profit corporation, tax I.D. #95-2872494) on or before [insert date].

Please transfer the shares to the U.C. San Diego Foundation's brokerage account with Merrill Lynch as follows:

Merrill Lynch  
Attn: Sid Art  
9560 Wilshire Blvd., 3<sup>rd</sup> Floor  
Beverly Hills, CA 90212

Telephone 800/967-8813

Account #210-04219  
DTC #5198

If there are any questions about this transfer of stock please call [insert your name and phone number]. Thank you for your prompt attention to this request.

\_\_\_\_\_  
(Signature/ Donor Name)

\_\_\_\_\_  
Spouse Signature/Name  
(if applicable)

cc: UC San Diego Foundation  
Attn: Marlene D. Shaver, Chief Financial Officer  
9500 Gilman Drive, Mail Code 0940  
La Jolla, CA 92093-0940

**SAMPLE OF DONOR GIFT LETTER TO THE U.C. SAN DIEGO FOUNDATION**

*Donor Name(s)*  
*Address*  
*Telephone Number*

[date]

Marlene D. Shaver  
Chief Financial Officer  
UC San Diego Foundation  
University of California, San Diego  
9500 Gilman Drive, Mail Code 0940  
La Jolla, CA 92093-0940

Dear Ms. Shaver:

I wish to provide support to the University of California, San Diego. Therefore, I have instructed my stock broker to irrevocably transfer [insert number of shares] shares of [insert stock name] common stock to the U. C. San Diego Foundation.

This gift shall be contributed to the [insert name of fund and fund number, or gift purpose if unknown]. I understand that UCSD assesses a one-time 4% administrative fee on all charitable gifts, including gifts of marketable securities, based upon the proceeds realized from the sale of the stock..

Please issue the gift receipt as follows:

[donor(s) name]  
[address]

If there are any questions about the designation of this gift or the transfer of stock, please call me/us at [insert your telephone number].

Sincerely,

(Signature/Donor Name)

(Signature of spouse/Name, if applicable)