



for the blind and visually impaired

| Palo Alto | San Jose | Santa Cruz

## Gifts of Stock to Vista Center

Vista Center for the Blind and Visually Impaired is very grateful to receive gifts of appreciated securities. Such a gift may have significant tax advantages to the donor over gifts of cash. For example, the donor may be able to take a tax deduction, allowable by law, for the market value of the securities rather than the cost basis for which they were purchased.

Please complete this form and send it to your personal stockbroker asking them to transfer these shares of stock. If you are holding your own certificates, the process is slightly different. Contact Vista's broker, Mitchell Hickey of Oppenheimer & Co., Inc., at 800-531-3649 or 415-438-3044 for an explanation of the procedure. You may email him at [mitchell.hickey@opco.com](mailto:mitchell.hickey@opco.com), or mail to his attention at 580 California St, #2300, San Francisco, CA 94104.

Gifts of securities may be transferred to Vista through our brokerage account at Oppenheimer & Co., Inc.<sup>1</sup> In making the transfer, you'll need to know:

<i>Account Name:</i>	<b>Vista Center for the Blind and Visually Impaired</b>
<i>Account Registration Number:</i>	<b>#G70-1610219</b>
<i>Oppenheimer &amp; Co., Inc. DTC Number:</i>	<b>DTC 0571</b>

To ensure that we give you the appropriate credit for your gift, please also us know the name of the company's stock being gifted and the number of shares provided, at [Development@VistaCenter.org](mailto:Development@VistaCenter.org). Our tax identification number is: #94-1196206. **Thank you for your gift!**

Date: \_\_\_\_\_

To: \_\_\_\_\_ Attn: \_\_\_\_\_  
*(your brokerage firm)* *(your broker)*

Please transfer \_\_\_\_\_ shares of \_\_\_\_\_ stock from  
account# \_\_\_\_\_, in the name of \_\_\_\_\_.

Your Printed Name(s) \_\_\_\_\_

Your Signature(s) \_\_\_\_\_

Your Phone Number (\_\_\_\_\_) \_\_\_\_\_

<sup>1</sup> Please do not instruct your broker to sell the stock or mutual fund and then forward the proceeds to Vista Center, as it could risk the tax benefits you would receive when Vista Center arranges for the disposition of the stock or mutual fund.