



Women's Fund of Santa Barbara 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:

- **Agent:** Montecito Bank & Trust Advisors DTC#0075
1000 State Street, Santa Barbara, CA 93101
- **Account Name:** Women's Fund of Santa Barbara
- **LPL Account:** 19650587

For questions or assistance, please contact Jorge Morales at Montecito Bank and Trust Advisors, (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—the fields will expand to fit the content.
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 contact Kathy Dunlap (805) 303-1205 or finance@womensfundsb.org.