



## DTC WIRING INSTRUCTIONS FOR STOCK OR BOND GIFTS: CALTECH

Please deliver by DTC to:

Charles Schwab  
California Institute of Technology, **Tax ID #95-1643307**  
DTC #0164 code 40  
Account number 2009-8618

### DONOR INFORMATION

DONOR NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

NAME OF SECURITY: \_\_\_\_\_

NUMBER OF SHARES: \_\_\_\_\_

FUND NAME/PURPOSE: \_\_\_\_\_

NAME OF BROKERAGE: \_\_\_\_\_

### IMPORTANT

Please send completed form to the Caltech Fund by fax to 626.395.5889 or by e-mail at [caltechfund@caltech.edu](mailto:caltechfund@caltech.edu) prior to transferring securities as **donor information does NOT transmit through the DTC wiring system**. If you have any questions, please call our main line at 626.395.6323.

**FOR YEAR-END GIFTS:** Be sure to allow extra time for the transfer from your broker's account to the Caltech Schwab account, and emphasize to your broker the importance of completing the transfer by December 31. When the 31st falls on a weekend, the transfer should be completed by the preceding Friday.