



## INFORMATION FOR STOCK TRANSFERS TO THE SANTA ROSA SYMPHONY

Brokerage account at Charles Schwab: **DTC # 0164, Code 40**  
Account Number **RZ 8751-7008**  
Account Name: **Santa Rosa Symphony**

After the brokerage firm has been instructed to make the transfer, please email Santa Rosa Symphony at [erickley@srsymphony.org](mailto:erickley@srsymphony.org) and provide the donor's name, type of stock, number of shares and date of transfer.

If you have any technical banking issues regarding the transfer, please contact:

**Patrick Bentivegna** AAMS®, AWMA®  
Email: [patrick.bentivegna@schwab.com](mailto:patrick.bentivegna@schwab.com)  
Sr. Financial Consultant, Santa Rosa  
NMLS # 730931  
CA Insurance License # OB27845  
Tel +1 707 569 7814 / Cell +1 707 339 2168

All stock donations are acknowledged in writing for tax purposes. Thank you for your generous support of Santa Rosa Symphony.