

The J. Paul Getty Trust – Stock/Mutual Fund Pledge Form

Notify your broker to initiate a “broker-to-broker” transfer. Please note that only mutual fund shares held in a brokerage account that can be transferred via DTC can be processed in this manner. For other mutual fund shares, please contact Trust Development at the number below. **Please fax the Pledge Form to State Street Bank & Trust.** This will facilitate the transfer of the donated stock from your brokerage account to the J. Paul Getty Trust’s brokerage account. The date of the gift is the day the stock passes from your control. The value for income tax purposes is the mean between the high and low quoted selling price on that day. Your gift will be acknowledged by the J. Paul Getty Trust with the valuation of your gift for tax purposes.

DESTINATION: Fax: (617) 786-2235

For Stock Donations:

State Street Bank & Trust

DTC Participant #997

Fund # BY1A

Fund Name: The J. Paul Getty Trust

For Mutual Fund Donations:

State Street Global Markets

DTC Participant #0226

Account # AB2037218

Acct. Name: The J. Paul Getty Trust

Please print:

DONOR NAME: _____

STOCK/SECURITY NAME: _____

CUSIP: _____

NUMBER OF SHARES: _____

ESTIMATED VALUE: _____

ANTICIPATED DATE OF TRANSFER: _____

Broker Name: (if used) _____

DTC Code: _____

Telephone: _____ **Email:** _____

Please also provide these details to the J. Paul Getty Trust contacts:

Trust Development – Phone (310)-440-7700 or TrustDevelopment@getty.edu

Joseph Sabbague – Phone (310)440-6741 or jsabbague@getty.edu

PLEASE INDICATE, AS APPLICABLE, HOW THIS GIFT IS TO BE

ALLOCATED: _____