

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

Notify your broker to initiate a “broker-to-broker” transfer. Please email stock donation Pledge Form to spearson@statestreet.com and cafrasu@statestreet.com and to Getty contacts listed below to facilitate the transfer of the donated stock. For mutual funds please email the Getty contacts (Broker, share amount and Ticker/Cusip) to determine eligibility prior to transfer. Please note that only mutual fund shares deemed eligible by State Street can be accepted. The date of the gift is the day the gift passes from your control. The value for income tax purposes is the mean between the high and the 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.

For Stock Donations:

State Street Bank & Trust Co.
DTC Participant No. 0997
Account No. BY6A
Agent Bank No. 26022
Reference: JPGT-Donor name

For Mutual Fund Donations:

**Delivery Instructions to be
delivered once Mutual Fund is
determined to be eligible for
trading by State Street as
stated above.**

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:

Brett Leach – Phone (310) 440-7627 or bleach@getty.edu

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

**PLEASE INDICATE, AS APPLICABLE, HOW THIS GIFT IS TO BE
ALLOCATED:** _____