



## HOW TO DONATE Securities, Wire Transfer or a Planned Gift (2019)

### **Donation of Stock/Securities**

Please let us know when you donate securities. Cal Maritime is not automatically notified when transfers are made to our account.

CMAF Account is at Morgan Stanley (contact info below).  
DTC – 0015  
Account Number: 838-010903  
Account Name: California Maritime Academy Foundation

Investment Advisor:  
Graystone Consulting: A Morgan Stanley Business  
Justin Crocker  
Group Director  
Assistant Vice President  
Phone: 925-746-2921  
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### **Donation by wire transfer to CMAF Account at Wells Fargo Bank, N.A.**

California Maritime Academy Foundation, Inc.  
Address: 200 Maritime Academy Drive, Vallejo, CA 94590  
Checking Account Number: 4848642690  
ABA/Routing Number: 121000248

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### **Planned Gifts and the Golden Bear Society**

Any bequest or estate gift is greatly appreciated. Please let us know of your intention to make an estate gift, of any amount, so that we may include you in the Golden Bear Society.

Planned gifts can be made in several ways:

- 1) From your estate:**
  - a) You can gift a specific dollar amount or asset.
  - b) You can gift a percentage of your estate.
  - c) You can gift from the balance or residue of your estate.
- 2) Beneficiary Designations from other assets:**
  - a) Life insurance
  - b) Retirement assets
  - c) Charitable remainder trusts
- 3) Notify Linda Solow Bouwer, Senior Director of Development and Campaign, of any inquiries/activity. 707-654-1789 or [lbouwer@csum.edu](mailto:lbouwer@csum.edu)**