



# Stock Gift Instructions and Designation Letter

DATE: \_\_\_\_\_

Please use these delivery instructions when you make a gift of stock to the Colorado Episcopal Foundation f/b/o:

\_\_\_\_\_  
NAME OF GIFT RECIPIENT(S) CITY

\_\_\_\_\_  
PURPOSE OF THE GIFT

NAME OF STOCK: \_\_\_\_\_

NUMBER OF SHARES: \_\_\_\_\_ DATE OF GIFT: \_\_\_\_\_

NAME OF BROKER TRANSFERRING SHARES: \_\_\_\_\_

ANTICIPATED DATE OF TRANSFER: \_\_\_\_\_

NAME & ADDRESS OF DONOR: \_\_\_\_\_

PHONE NUMBER OF DONOR: \_\_\_\_\_

SIGNATURE OF DONOR: \_\_\_\_\_

- If the shares are held in a brokerage account, please instruct the broker to deliver the shares to:

DTC	#901	(Bank of New York)
For Credit	#016071	(Bank of Oklahoma)
FFC	#71A005066	(Colorado Episcopal Foundation)

- Certificated shares should be sent by registered mail to the address below. A stock power with your signature guaranteed should be mailed in a separate envelope to the address below:

**Colorado State Bank & Trust**  
**Attn: Sara Swain, Trust Department**  
**1600 Broadway**  
**Denver, CO 80202**

- In order to give MUTUAL FUNDS, typically a temporary account for the Colorado Episcopal Foundation (CEF) must be set up with your mutual fund company representative, and the funds transferred to CEF's temporary account. (Contact your mutual fund company representative for specific instructions.) Your mutual fund company representative must be instructed to sell immediately after the transfer and to have a check issued payable to the **Colorado Episcopal Foundation** and mailed to the above address. (Be sure to indicate account #71A005066.)

*Please forward this form to Colorado State Bank & Trust, Attn: Sara Swain and a copy to the Colorado Episcopal Foundation, Attn: Scott Asper, 1300 Washington Street, Denver, CO 80203.*

*Due to volume and consolidated banking relationships, stock transactions effected through CEF are on a reduced commission basis. The Foundation charges no fees for stock gift transactions.*



**IT IS THE POLICY OF THE COLORADO EPISCOPAL FOUNDATION  
THAT ALL STOCK WILL BE SOLD IMMEDIATELY**