



## STOCK GIFT INSTRUCTIONS for Transferring Stock Electronically

### Broker Account Request Instructions:

- 1) Send a transfer request letter to the donor's brokerage firm instructing them to transfer the stock to the account for the **Colorado Episcopal Foundation** at:

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

- 2) Send a copy of the [Stock Gift Instructions and Designation Letter](#) to:

Colorado State Bank and Trust	and	Colorado Episcopal Foundation
Attn: Sara Swain		Attn: Scott Asper
1600 Broadway		1300 Washington St.
Denver, CO 80202		Denver, CO 80203

The letter should include any special instructions for the stock gift (*i.e.*, who is designated as recipient(s) of the gift). Please make sure to include the address of the donor and the recipient. When Colorado State Bank and Trust has received all the documents, the shares will be sold.

After the stock is sold, the proceeds will be deposited with the Colorado Episcopal Foundation (CEF) and a check will then be issued and forwarded as the donor has requested. A letter will be sent to the donor stating the date that the stock was received by the bank and the high/low value for that day. Due to volume and consolidated banking relationships, stock transactions effected through CEF are on a reduced commission basis. The Foundation charges no fee for stock gift transactions.

In order to give MUTUAL FUNDS, typically a temporary account for the Colorado Episcopal Foundation must be set up with your mutual fund company 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 a check issued payable to the **Colorado Episcopal Foundation** and mailed to the above address. (Be sure to indicate account #71A005066.)



**It is the policy of the Colorado Episcopal Foundation  
that all stock will be sold immediately**