



## STOCK GIFT INSTRUCTIONS FOR GIVING STOCK CERTIFICATES

- 1) Do not sign the back of the stock certificate.
- 2) Sign the **Stock Power**. All persons named on the stock certificate **must** sign their names as they appear on each stock certificate. This form must be signature guaranteed, which can be done by the donor's bank or by a national brokerage house. This form should **not** be filled out, except for the signatures. The bank will complete the necessary sections on the form. A separate stock power is required for each certificate.
- 3) Forward all of the documents to Colorado State Bank & Trust, Attn: Sara Swain, 1600 Broadway, Denver, CO 80202. For security reasons, please mail the stock certificate(s) in one envelope and the Stock Power(s) in a second envelope.
- 4) Send a copy of the **Stock Gift Instructions and Designation Letter** to:

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

Colorado Episcopal Foundation  
Attn: Scott Asper  
1300 Washington Street  
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 & Trust has received all the documents, the shares will be sold.

After the stock is sold, proceeds will be deposited with the Colorado Episcopal Foundation 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.

**To donate a portion of the shares included in a physical stock certificate, do the following:**

Draft a letter of instruction to Sara Swain, Colorado State Bank & Trust indicating the number of shares you wish to donate and the number you wish to have transferred back to you. A new certificate will be issued to you reflecting the number of shares transferred back to you. Please include in the letter, your address and tax identification number for the new shares.



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