



# Stock Gift Instructions & Designation Letter

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

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

\_\_\_\_\_  
NAME OF CHURCH OR DIOCESAN INSTITUTION

\_\_\_\_\_  
CITY

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

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

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

NUMBER OF SHARES: \_\_\_\_\_

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

DONOR NAME: \_\_\_\_\_

DONOR ADDRESS: \_\_\_\_\_  
\_\_\_\_\_

PHONE: \_\_\_\_\_

E-MAIL: \_\_\_\_\_

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

**ADDITIONAL SIGNER:** \_\_\_\_\_

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

**DTC                    #0901                    (Bank of New York)**

**For Credit        #016071                (Bank of Oklahoma)**

**FFC                    #71A005066        (Colorado Episcopal Foundation)**

The Colorado Episcopal Foundation provides all donors a gift acknowledgement letter. Please call us if you have not received a letter within 10 business days after the date of your gift.

*The Foundation charges no fees for stock gift transactions.*

- **PLEASE FORWARD THIS FORM TO THE COLORADO EPISCOPAL FOUNDATION AT THE E-MAIL ADDRESS BELOW OR FAX TO 303.534.6012 PRIOR TO THE TRANSFER.**
- **FOR MUTUAL FUND DONATIONS OR PAPER STOCK CERTIFICATE, PLEASE CONTACT SCOTT ASPER AT 303-534-6778.**



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