



Transfer of Stock Form

To transfer stock as a donation to the Bozeman Area Community Foundation, please provide your broker the following instructions:

Broker's Name: _____

Brokerage Firm Name: _____

Broker's Address: _____

Re: Your Account No.: _____

Account Registration: _____

Subject: Stock Gift Transfer

Dear Broker:

Accept this letter as a request and authorization to execute the following stock gift transfer of shares from the above referenced account. Please deliver these shares to the broker for the Bozeman Area Community Foundation as follows:

Security Name/Ticker: _____

Number of Shares: _____ Approximate Value: _____

Approximate Date of Transfer: _____

(Please note: The date of your gift will be the date the stock is titled in the Community Foundation's name or is transferred to our account)

Fund designation for this gift: _____

Pershing

DTC & OCC clearing number: 0443

Further Credit A/C # to 4LJ009977

For Benefit Of: Bozeman Area Community Foundation

The Federal ID number for the Bozeman Area Community Foundation is **81-0519514**. If you have any questions, please contact the Bozeman Area Community Foundation's broker at (406) 587-4300 or Bridget Wilkinson at 406-587-6262 at the Bozeman Area Community Foundation. **Thank you for your stock gift!**

Sincerely,

Owner Signature*

Co-Owner Signature*

*All authorized fund holders must sign

Please Note: It is extremely important that you notify the Community Foundation when transferring securities into this account so we may credit your gift to the appropriate charitable fund. Securities cannot be sold until the donor has been identified. Additionally, your name and address are required for tax deduction and acknowledgement purposes. Please mail a copy of these instructions to 111 S. Grand Ave. Ste. 214 Bozeman, MT 59715 Attn: Bridget Wilkinson. Thank you!