

Gifts of Mutual Funds

Thank you for your interest in donating mutual funds to Central Florida Foundation. The following outlines procedures for making such gifts. For specific legal, tax or investment questions, we recommend you consult your financial, legal or tax professional.

Mutual Funds

1. Complete the Mutual Fund Gift Transmittal Form [attached].
2. Provide it to your broker. Your broker will need to reach out to Darlene Moulder at SunTrust Bank to coordinate the transfer. [See attached form].
 - Phone: 407-237-5986
 - Email: Darlene.moulder@suntrust.com
3. Fax to Central Florida Foundation at 407-425-2990 or email a copy to Nicole Donelson at ndonelson@cffound.org.

For assistance, please contact Meghan Warrick, Chief Financial Officer, at 407-872-3050 ext.115.

Mutual Fund Gift Transmittal Form

To transfer Mutual Funds as a donation to Central Florida Foundation, please communicate the following instructions to your broker in writing [*and fax a copy to Central Florida Foundation at 407-425-2990*]:

Broker Name: _____

Broker Phone: _____

Firm Name: _____

Address: _____

Re: Donor's Account Number: _____

Donor's Name: _____

Subject: Mutual Fund Gift Transfer (non-ACATS Eligible)

Non-ACATS Eligible: Please contact Darlene Moulder at SunTrust Bank to coordinate transfer. Call 407-237-5986 or email: darlene.moulder@suntrust.com

ACATS eligible: DTS 2039 – SEI Private Trust Co | For further credit: SunTrust Bank #11188 | Final credit: Central Florida Foundation #5640280

Dear Broker:

Please accept this letter as a request and authorization to execute the following Mutual Fund gift transfer from the above referenced account. Please deliver these shares to the broker for Central Florida Foundation as follows:

Company Name: _____ **Symbol:** _____

Number of Shares: _____

Date of Transfer: _____

[Note: the date of your gift will be the date the stock is titled in Central Florida Foundations name or is transferred to our account.]

The Federal I.D. number for Central Florida Foundation is 59 - 3182886. If you have any questions, please contact Meghan Warrick, Chief Financial Officer at 407-872-3050, ext. 115.

Sincerely,

Signature

Date

Donor Address: _____

Fund Designation for this gift: _____