

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 [next page].
2. Provide it to your broker. Your broker will need to reach out to Beverly Glenn at Truist Bank to coordinate the transfer. [See transmittal form].
  - Phone: 404-724-3556
  - Email: [TruistBankGiftClearing@truist.com](mailto:TruistBankGiftClearing@truist.com)
3. Email a copy to Nicole Donelson at [NDonelson@cffound.org](mailto:NDonelson@cffound.org).

For assistance, please contact Nicole Donelson, VP of Philanthropy at 321-966-2588.

To transfer Mutual Funds as a donation to Central Florida Foundation, please communicate the following instructions to your broker in writing **and email to Nicole Donelson at NDonelson@cffound.org.**

Broker Name: \_\_\_\_\_ Broker Phone: \_\_\_\_\_

Firm Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Re: \_\_\_\_\_

Donor's Name: \_\_\_\_\_

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

Non-ACATS Eligible: Please contact Beverly Glenn at Truist Bank to coordinate transfer. Call 404-724-3556 or email: TruistBankGiftClearing@Truist.com.

ACATS eligible: DTS 2039 – SEI Private Trust Co | For further credit: Truist 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 Nicole Donelson, VP of Philanthropy at 321-966-2588.

Sincerely,

\_\_\_\_\_  
Signature Date

Donor Address: \_\_\_\_\_

Fund Designation for this gift: \_\_\_\_\_