

## Gifts of Stocks and Bonds

Thank you for your interest in donating stocks or bonds 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.

To make a donation of stocks and/or bonds, please follow the instructions below.

1. Complete a Stock Transmittal Form [next page]
2. Submit a copy to your broker, and
3. Email a copy to Nicole Donelson at [ndonelson@cffound.org](mailto:ndonelson@cffound.org).

If you have stocks in certificate form please contact the Foundation for detailed instructions and guidance. Gifts of mutual funds should refer to the Gifts of Mutual Funds document found on our website [HERE](#).

Please note that for tax purposes, the date of your gift will be the date the stock is titled in Central Florida Foundation's name or is transferred to the Foundation's account.

For assistance or questions, please contact Nicole Donelson, VP of Philanthropic Strategies & Partnerships, at 407-872-3050 ext.123 or email [NDonelson@cffound.org](mailto:NDonelson@cffound.org).

Gifts of stocks and bonds should be transferred electronically to the Foundation's account at Truist Bank. The transfer will be through DTC. **Please note that all deliveries must include the Foundation's name and account number.** The instructions are:

SEI Private Trust Co  
DTC Participant #2039  
FFC Truist Bank  
Account # 5640280  
FBO: Central Florida Foundation  
Donor Name  
Attn: Beverly Glenn 404-724-3556

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

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

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

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

\_\_\_\_\_

The following shares of stock were donated to the Central Florida Foundation:

Stock Company Name	Symbol	# of Shares	Donation Date

I certify that prior to donation to the Central Florida Foundation, the stock shares listed above were property of:

Legal Name of Donor: \_\_\_\_\_

Donor's Signature: \_\_\_\_\_

Charitable Fund designation for this gift: \_\_\_\_\_

**Upon completion of this Stock Transmittal Form, please be sure to:**

1. Submit a copy to your broker, and
2. Email a copy to Nicole Donelson at [ndonelson@cffound.org](mailto:ndonelson@cffound.org).