

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 Steve Jerina at sjerina@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 Steve Jerina, VP of Philanthropic Strategies and Partnerships at 407-872-3050 ext.123 or at sjerina@cffound.org

Stock Transmittal Form

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: Janel Liddelow-Johnson - 404-230-5076 or
Dawn Keevill-Carey - 404-588-8296

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 Steve Jerina at sjerina@cffound.org