

GUIDE TO GIFTS OF SECURITIES

This guide is provided for donors making gifts to the Central Florida Foundation using appreciated securities that are publicly traded, including stocks, bonds, and mutual funds. 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.

Publicly Traded Stocks or Bonds Held at a Bank or Brokerage Firm

To transfer stocks or bonds, complete a **Stock Transmittal Form** (attached below), submit a copy to your broker and *fax a copy to the Central Florida Foundation*.

Publicly Traded Stocks or Bonds You Hold in Certificate Form

To transfer stocks or bonds, complete a **Stock Power Form** (attached below) and a **Certificate Transfer Letter** (attached below), and deliver them to the Central Florida Foundation along with the unsigned stock certificate.

Mutual Funds

Generally, the mutual fund company will require a new account to be established in the name of the Central Florida Foundation in order to transfer shares. To transfer mutual fund shares, contact your mutual fund company for their process to contribute shares. Once you have this information, contact Mary Meghan Flanagan at mflanagan@cffound.org or 407-872-3050 ext. 116, and let her know what the mutual fund company requires.

STOCK TRANSMITTAL FORM

To transfer stock 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 SSN: _____

Donor's Name: _____

Subject: Stock gift transfer

Dear Broker:

Please 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 Central Florida Foundation as follows:

BMO Harris Bank, N.A.
Participant #0992
F/C: 98-711849AB5

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: _____

CENTRAL FLORIDA FOUNDATION

Date: _____

I am making an irrevocable gift to the Central Florida Foundation of the following securities:

# Shares	Company	Certificate #
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_____	_____	_____
_____	_____	_____
_____	_____	_____

And confirm that I relinquish all rights thereto.

Please deposit the proceeds into the _____ Fund.

Sincerely,

Donor Signature

To:

Acct #:

The above named donor wishes to contribute the above named securities to the Central Florida Foundation. This is a written authorization for you to sell the securities on behalf of the Central Florida Foundation.

Please contact Meghan Warrick at 407-872-3050 ext. 115 to transfer net proceeds.

Sincerely,

Mark Brewer
Chartered Advisor in Philanthropy®
President/CEO