



# COMMUNITY FOUNDATIONS OF THE HUDSON VALLEY

SERVING DUTCHESS, PUTNAM & ULSTER COUNTIES

## STOCK DONATION FORM

Thank you for your gift of securities to the Community Foundations. Your broker will require you to send them instructions in writing.

Use the form below to instruct your broker to transfer your gift to the Community Foundations. **Please call 845-452-3077 for the Community Foundations' DTC and Account numbers.**

TD Ameritrade, DTC # \_\_\_\_\_

Community Foundations of the Hudson Valley, Acct.#: \_\_\_\_\_

### **Gift Information:**

Date Sent to the Community Foundations from Donor's Acct: \_\_\_\_\_

Donor Name(s): \_\_\_\_\_

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

City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

1. Stock Name/ Symbol: \_\_\_\_\_ Number of Shares: \_\_\_\_\_

2. Stock Name/ Symbol: \_\_\_\_\_ Number of Shares: \_\_\_\_\_

3. Stock Name/ Symbol: \_\_\_\_\_ Number of Shares: \_\_\_\_\_

### **Please Distribute My Gift as Follows:**

\$ or % \_\_\_\_\_ Unrestricted

\$ or % \_\_\_\_\_ Restricted to the following fund(s): \_\_\_\_\_

This gift is in honor of/in memory of: \_\_\_\_\_

Other Special Instructions: \_\_\_\_\_

\_\_\_\_ I hereby release my name and contact information so that I may receive a receipt from the Community Foundations of the Hudson Valley. *NOTE: If you choose not to release your name and contact information, the Community Foundations will not be able to provide you with a gift receipt.*

Signed (Donor) \_\_\_\_\_ Date \_\_\_\_\_

Signed (Donor, joint owner) \_\_\_\_\_ Date \_\_\_\_\_

Please fax this form to (845) 452-3083, or email it to [SCross@cfhvny.org](mailto:SCross@cfhvny.org)