



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