



## STOCK DONATION FORM

Thank you for your gift of securities to the Community Foundations. You may use this form, or a form they provide to you, to instruct your broker to transfer your gift to the Community Foundations. Please be sure to forward this form to us to notify us of your gift and the fund you would it directed to.

Schwabb, DTC # 0164; Community Foundations of the Hudson Valley, Acct.#: 2187-3129

Address: Community Foundations of the Hudson Valley, 25 Van Wagner Road, Poughkeepsie, NY 12603

### Gift Information:

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: \_\_\_\_\_

### Broker Information:

Company: \_\_\_\_\_ Name: \_\_\_\_\_

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

### 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 for tax purposes.*

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

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

Please email this form to:

[SMarrero@communityfoundationshv.org](mailto:SMarrero@communityfoundationshv.org)

If you have any questions, please call (845) 452-3077.