

STOCK TRANSFER

INFORMATION SHEET

Please provide the following to Jean Brenneman, CFO:

For the Donor –

Thank you for your interest in contributing a gift of stock to the Community Foundation. Please provide the following information to Jean Brenneman, CFO, (jean.brenneman@gcrf.org) as soon as possible to facilitate the transfer of stock:

1. Name or ticker symbol of stock and number of shares being gifted.
2. Name of the fund at the Community Foundation to which the stock gift should be applied.
3. Your name and contact information, so the Community Foundation can acknowledge the stock gift.

For the Financial Advisor –

Thank you for your assistance in transferring the above gift of stock to the Community Foundation. Please provide the following information to Jean Brenneman, CFO, (jean.brenneman@gcrf.org) as soon as possible to facilitate the transfer of stock:

1. Date the stock transfer will be completed.
2. Last four digits of the account number and name of firm delivering the stock gift.

The information below is provided in order for you to complete the stock transfer.

ACCOUNT INFORMATION

Greater Cedar Rapids Community Foundation
ATTN: President & CEO
324 Third Street SE
Cedar Rapids, IA 52401
TAX ID 42-6053860

DTC ELIGIBLE SECURITIES

Charles Schwab & Co., Inc.
DTC 0164
FBO Greater Cedar Rapids Community Foundation
A/C 9430-4595
Please note: All deliveries **MUST** include our name and account number.

WIRED FUNDS

Citibank NA, NYC, NY 10043
ABA 021000089
FBO Charles Schwab & Co., Inc.
A/C 40553953
FAO Greater Cedar Rapids Community Foundation
Schwab A/C 9430-4595