

STOCK TRANSFER INFORMATION

For the Donor

Thank you for your interest in contributing a gift of stock to the Community Foundation. Please provide the following information to **Shirley Amthauer, Controller**, (shirley.amthauer@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.

Alternatively, we can process a pass-through stock gift directly to a nonprofit organization for a 2% fee on the gift value, with a maximum fee of \$500. If interested in a pass-through gift, provide the nonprofit organization's name for step 2 above. Gifts to funds will incur fees based on the fee structure of the fund receiving the 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 **Shirley Amthauer, Controller**, (shirley.amthauer@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
For The Account Of: Greater Cedar Rapids Community Foundation
Account Number: 9430-4595
Please note: All deliveries **MUST** include our name and account number.

WIRED FUNDS

Citibank, NA
New York, NY 10005
ABA Number: 021000089
Account Name: Charles Schwab & Co, Inc.
Account Number: 4055-3953
For Further Credit Account Name: Greater Cedar Rapids Community Foundation
For Further Credit Account Number: 9430-4595