



How to Gift Securities

1. Tell the Community Foundation you intend to give securities before making a transfer:

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Director of Development
lauren@cfect.org
860.442.3572

or

Geoffrey Taylor
Director of Donor Relations
geoffrey@cfect.org
860.442.3572

Please include these details in your message:

- Type of stock
- Number of shares
- Intended use (ie: unrestricted, or to benefit a specific fund)

Providing this information to us before making a transfer will ensure accurate designation and proper acknowledgement of your gift

2. Initiate the transfer

- **If your broker or bank holds the certificate:**

To transfer stock using the DTC automated system, your financial agent needs the following information:

Receiving Company:	U.S. Bank
DTC Participant Number:	2803
FFC:	1-100821, Comm Fdn of Eastern CT IMA – Gifts

- **If you hold the certificate, please contact the Community Foundation for instructions.**

Notes: The Fair Market Value of publicly traded stock is calculated as the median of the highest and lowest selling price on the donation date.

Community Foundation of Eastern Connecticut's EIN/ Federal Tax ID: 06-1080097