



## How to Gift Securities to the Foundation

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

Lauren C. Parda  
Director of Development  
[lauren@cfect.org](mailto:lauren@cfect.org)  
860.442.3572

or

Geoffrey Taylor  
Director of Donor Relations  
[geoffrey@cfect.org](mailto: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