



**Community Foundation of Boone County
Donated Securities Transfer Form**

Please complete this form to help us with the transfer of assets to the Community Foundation of Boone County. We appreciate your contribution!

Donor Name _____

Donor Address _____

City _____ State _____ Zip _____

Contact Name & Phone _____

Name of Security _____

Number of Shares/Units _____

Date of Gift _____ High and Low Value/Share _____

High and Low Value on Date of Transfer _____

The broker or asset custodian will need the following information to send us the securities:

DTC Eligible Transfers:

Code 40
DTC #0164
Charles Schwab & Co., Inc.
Attn: Transfer of Accounts
101 Montgomery Street
San Francisco, CA 94104
FBO: Community Foundation of Boone Co.
Acct #: 9763-3941

Physical Delivery of Certificates:

Charles Schwab & Co., Inc.
Attn: ISTW1
2423 East Lincoln Drive
Phoenix, AZ 85016-1215
FBO: Community Foundation of Boone Co.
Acct #: 9763-3941

_____ **Restricted Gift**, Fund Name _____

_____ **Unrestricted Gift** (Community Foundation may use for its most immediate needs)

Send Completed Form To:

Kristi Reynolds
102 N. Lebanon Street, Suite 200 | Lebanon, IN 46052
kristi@communityfoundationbc.org
Phone: 765.482.0024 FAX: 317.873.0219