# Notification Letter for Transfer of Stock



*(Please complete and forward to BMO and CFSW)*

|  |  |
| --- | --- |
| Date:  |       |
|  |
| Broker Name:  |       |
|  |
| Brokerage Firm:  |       |
|  |
| Address:  |       |
|  |
| City:  |       | State:  |       | Zip:  |       | Phone:  |       |

**RE: Gift of Stock to Community Foundation of Southern WI, Inc.**

|  |  |  |
| --- | --- | --- |
| Dear |   | , |

### This letter constitutes my direction to you to transfer the following shares of stock from my

|  |  |  |
| --- | --- | --- |
| brokerage account #  |       | to the Community Foundation of Southern WI, Inc. |

|  |  |  |  |
| --- | --- | --- | --- |
| Number of Shares: |       |  Name of Stock or Mutual Fund:  |       |
| Number of Shares:  |       |  Name of Stock or Mutual Fund:  |       |
| Number of Shares:  |       |  Name of Stock or Mutual Fund:  |       |

[ ]  I have added a separate sheet listing additional stocks to be transferred.

|  |  |
| --- | --- |
| **I intend this transfer to be a gift to the fund named**  |       |

held at the Community Foundation of Southern Wisconsin, Inc.

|  |  |  |  |
| --- | --- | --- | --- |
| Name:  |       |  Address:  |       |
| Signature: |  |  City:  |       | State:  |       | Zip:  |       |

#### Delivery Instructions/Regular Stock Only

#### F/C Account Community Foundation Contribution Account

F/C Account Number 41-J004-02-2

BMO Harris Bank N.A. DTC Participant #992

**Please Contact:** Jennifer Schneider BMO Harris Bank 608-232-2012 **OR**

Peggy Dimitrakakis BMO Harris Bank 414-287-8606

For **Certificates of Stock and Mutual Funds** contact Jennifer Schneider (above) for instructions.

#### Visit: 121 N. Parker Dr. Janesville, WI 53545 Email: info@cfsw.org Phone: 608-758-0883

**Mail: Community Foundation of
 Southern Wisconsin, Inc.**

 **Attn: President/CEO**

**P.O. Box 8125
Janesville, WI 53547-8125**