



INSTRUCTIONS TO
TRANSFER SECURITIES, CASH, RMDs, and DAFs
TO SANTA FE COMMUNITY FOUNDATION

If you are transferring stock or cash, please notify the foundation of your gift. Banking privacy laws do not allow identification of donors or brokerage houses when the gift is made.

Santa Fe Community Foundation
Federal Tax ID #: 85-0303044

To transfer securities:

Santa Fe Community Foundation
Fidelity Account # 658-044303
DTC Clearing # 0226

To transfer cash:

Enterprise Bank and Trust #081-006-162 (ABA number)
Santa Fe Community Foundation Account # 00-423076-01

Please Note: Due to privacy requirements, we are unable to access donor information through the financial agencies that process your transfer. Please provide us with the following information so that we may properly acknowledge and receipt your gift:

- Donor Name (s) – first and last
- Donor address/phone
- Designate the name of the fund (s) and the amounts for each fund
- If transferring stock: name of stock and number of shares transferring (approx. cash value)
- Amount of cash transfer

Information should be sent to:
Gabriela Gomez, VP for Advancement
505-988-9715, ext. 7006
ggomez@santafecf.org

RMD and DAF Checks can be mailed to:

Santa Fe Community Foundation
Attn: Gabriela Gomez
PO Box 1827
Santa Fe, NM 87504