



INSTRUCTIONS TO  
TRANSFER SECURITIES / GOVERNMENT SECURITIES / CASH  
TO SANTA FE COMMUNITY FOUNDATION

If you are transferring stock, 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
- Name of stock and number of shares transferring (approx. cash value)
- Amount of cash transfer

Please call the Santa Fe Community Foundation at 505.988.9715 to report all wire and securities transfers prior to initiating the transactions, to ensure they are properly processed.