# 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: |  |
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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](mailto: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**