



Stock Transfer Instructions

Please note: it is extremely important that you notify the Community Foundation when transferring securities into this account so that we may credit your gift to the appropriate fund.

What we need from you

Please fill out the accompanying "Stock Transfer Notification Form" and send directly to Alex McCreary-Ellis, Officer- Operations, Asset Development and Donor Relations, at Pikes Peak Community Foundation – amccreary-ellis@ppcf.org.

Information for your investment manager

Share the following instructions with your Manager to successfully complete a transfer of stock to the Community Foundation:

Charles Schwab & Co.

DTC: 0164

Account: 4407-1740

Account Name: Pikes Peak Community Foundation

Please notify Alex McCreary-Ellis, Officer- Operations, Asset Development and Donor Relations, of any stock transfers.

Alex McCreary-Ellis

719-445-0601

amccreary-ellis@ppcf.org

If you need assistance in regards to the Schwab account receiving your donation, please contact the FEG OCIO Client Service Team at 513-977-4400 or ocio@feg.com.



External Stock Transfer Notification Form

Thank you for using Pikes Peak Community Foundation as the vehicle for your philanthropic giving. Please fill out this form for **each** stock transfer and return to Alex McCreary-Ellis, amccreary-ellis@ppcf.org, to initiate the completion of your stock gift.

Donor Information

Name: _____

Address: _____

City, State, Zip: _____

Phone: _____

Email: _____

Gift Information

Name of stock/quantity of shares being transferred: _____

Anticipated date of transfer: _____

Investment Manager Information Name:

Address: _____

City, State, Zip: _____

Phone: _____

Email: _____

Receiving Organization Information

Organization Name: _____ Pikes Peak Community Foundation

Receiving Fund Name: _____

Address: _____ 315 E. Pikes Peak Avenue, Ste. 120

City, State, Zip: _____ Colorado Springs, CO 80903

Phone: _____ 719-445-0601

Email: _____ amccreary-ellis@ppcf.org