



# Stock or Mutual Fund Gift Form

Have questions? Need assistance?  
**Community Foundation**  
 200 E Buffalo St  
 Suite 202  
 Ithaca, NY 14850  
 (607) 272-9333  
 info@cftompkins.org

**Information for Donor**

Please fill out this form and send it to Community Foundation of Tompkins County.  
 Email completed form to Amy LeViere [aleviere@cftompkins.org](mailto:aleviere@cftompkins.org) or mail to:

Amy LeViere, Philanthropic Services Officer  
 200 E Buffalo St Ste 202  
 Ithaca, NY 14850

Signature of donor is required.

**Information About Donor**

Name of Donor: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_ Email Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP Code: \_\_\_\_\_

**Information About Gift**

Name of Stock(s) or Mutual Fund(s): \_\_\_\_\_ Number of Shares: \_\_\_\_\_

**Fund Designation (select one):**  
 I am donating the above named stock or mutual fund to Community Foundation of Tompkins County. The proceeds of this gift are to be applied to:

Community Foundation of Tompkins County programs and services (*where needed most*)

A specific Community Foundation fund (*please specify*):

\_\_\_\_\_

Deliver shares to the broker for Community Foundation as follows:  
**Charles Schwab & Co. Brokerage Account**  
 DTC #: 0164 Code: 40  
 Account Name: Community Foundation of Tompkins County, Inc  
 Account #: 9817-4092

**Authorization**

By signing below, I relinquish all rights, privileges, and dividends on this stock.

Once this form is received, we will contact you with specific gift transfer information within 3-4 business days.  
 If you are not contacted within this time frame, please feel free to contact us or submit this form again.

Signature of Donor: \_\_\_\_\_ Date: \_\_\_\_\_

*Thank you for your support!*