



**The Community Foundation
for Greater New Haven**

Electronic Transfer Instructions for Stock Gifts

We appreciate your interest in making a gift of securities to The Community Foundation *for* Greater New Haven. Following the instructions below will help ensure that your gift is processed in a timely manner and accurately directed to your desired use.

1. Prior to transferring shares, please contact The Community Foundation and provide the following information:
 - a. Name of your broker and firm assisting with the transfer
 - b. Stock name and number of shares
 - c. How you would like this gift to be used (i.e., the fund or purpose to which the gift should be directed)
2. Please advise us, directly or through your broker, when the stock transfer is complete. Once the gift is received and processed by The Community Foundation, a gift acknowledgement letter will be sent to you.

The Community Foundation *for* Greater New Haven Contact Information:

The contact at The Community Foundation for notifications, questions and information is:

Ms. Dotty Weston-Murphy
Vice President, Donor and Professional Services
The Community Foundation *for* Greater New Haven
Phone Number: 203-777-7081
Fax Number: 203-787-6584
Email: dmurphy@cfgnh.org

The Community Foundation *for* Greater New Haven Brokerage Account Options:

Bank of America/Merrill Lynch
Account Number: 81204182
DTC Number: 5198
Contact Person: Elizabeth Hartmayer
Phone Number: 203-789-2470
Fax Number: 203-635-4535

Morgan Stanley Smith Barney
Account Number: 577-24053
DTC Number: 0418
Contact Person: Barbara Ellinghaus
Phone Number: 203-772-3970
Fax Number: 203-497-9499

