



JEFFERSON
COMMUNITY FOUNDATION

STOCK TRANSFER DIRECTIVE

*Thank you for your charitable gift! To transfer a gift of stock, please complete the form below and provide it to your broker. It is extremely important that you or your broker **notify us when transferring securities** into this account so that we may credit your gift to the appropriate charitable fund. Please notify Jefferson Community Foundation that a stock transfer is in process and provide the name and number of shares and the fund to which the shares should be credited. See contact details below.*

Broker name: _____

Broker's firm name: _____

Broker's address: _____

Re: Your account number: _____

Your name: _____

Dear Broker: Please accept this letter as a request and authorization to execute the following stock gift transfer of shares from the above referenced account. Please deliver these shares to the broker for the Jefferson Community Foundation as follows:

DTC Clearing #0075

LPL Account #7205-5697

Jefferson Community Foundation

Attn: Siobhan Canty; JCF CEO; O: 360-385-1729; M: 202-821-6706; Siobhan@jcfgives.org and/or Michael Ivers, LPL Financial Advisor; 360-344-4916; michael.ivers@lpl.com

Asset description: _____

Number of shares: _____

Date of transfer: _____

Please note that the date of your gift will be the date the stock is titled in the Community Foundation's name or is transferred to our account.

Fund designation for this gift: Jefferson Community Foundation

After the stock is received, it is sold immediately, and the proceeds are deposited into the appropriate account.

A letter will be sent from us which confirms the stock transfer including the number of shares, and fair market value. That letter can then be used as documentation for your individual tax return.

Please contact JCF (contact info above) with information on securities being transferred once the order has been placed. Thank you again for your generous support for our community work!