



Memorandum

Date:

Re: Stock or Wire Transfer to the Community Foundation of Teton Valley

Phone: 208-354-0230

Fax: 307-734-2841

Thank you for your interest in making a charitable gift to the Community Foundation of Teton Valley. The information your broker or banker will need to transfer stock or wire funds is noted below along with the information we will need to properly enter and acknowledge your contribution.

Please fax this form to 307-734-2841 or email to tadams@cftetonvalley.org.

Please provide your broker/banker with the following information:

For Direct Stock Transfers

For Cash Wire Transfers

Charles Schwab & Co, Inc.
P.O. Box 628291, Orlando, FL 32862
DTC: 0164, Code 40
Account Number: 9304-1267
Account Name: Community Foundation of Teton Valley

Wells Fargo Bank
185 S. Main Street, Driggs, ID 83422-1340
ABA Routing Number: 121000248
Account Number: 600301329
Account Name: Community Foundation of Teton Valley

David Elan or Liza Millet: 307-733-5100

Phone: 208-354-2200

Please provide the Community Foundation with the following information:

Name: _____

Address: _____

Phone: _____

Email: _____

Date of Transfer Request: _____

Is this gift anonymous? Yes _____ No _____

Stock Name: _____

of Shares: _____

Broker Name: _____

Broker Phone: _____

Is this a Tin Cup Challenge Gift?

_____ No. Please indicate recipient fund name: _____

_____ Yes. Please indicate your designations below by percent, shares or specific amount(s).

If listing fixed amounts, please note where any difference between the estimated gift total and the net sales proceeds should be added/deducted. Net sales variance: _____

1. _____, %/##/\$ _____ 2. _____, %/##/\$ _____

3. _____, %/##/\$ _____ 4. _____, %/##/\$ _____

5. _____, %/##/\$ _____ 6. _____, %/##/\$ _____