



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 email this form to bself@cftetonvalley.org. If you have any questions, please call 208-354-0230

Please provide your broker/banker with the following information:

<i>For Donor Advised Funds</i>	<i>For Cash Wire Transfers</i>	<i>For Direct Stock Transfers</i>
Inform your donor-advised fund administrator to make one check payable to the Community Foundation of Teton Valley or Community Foundation of Jackson Hole (our affiliate). Shared EIN# 83-0308856 Mail to: Community Foundation of Teton Valley P.O. Box 1523 Driggs, ID 83422	Wells Fargo Bank 185 S. Main Street Driggs, ID 83422-1340 Phone: 208-354-2200 ABA Routing Number: 121000248 Account Number: 600301329 Account Name: Community Foundation of Teton Valley	Charles Schwab & Co, Inc. P.O. Box 628291 Orlando, FL 32862 DTC: 0164, Code 40 Account Name: Community Foundation of Teton Valley Account Number: 9304-1267 David Elan: 307-733-5100

Please provide the Community Foundation with the following information:

Name: _____

Address: _____

Phone: _____ Email: _____

Is this a Tin Cup Challenge Gift?

No – Please indicate the recipient fund name: _____

Yes – Please indicate your nonprofit designations below or attach an additional document including percent, shares, or specific amount(s).

1. _____ %#\$
2. _____ %#\$
3. _____ %#\$
4. _____ %#\$
5. _____ %#\$
6. _____ %#\$

Check all that apply

I wish for this gift to remain anonymous.

I do not want written thank-you notes.

Additional Comments:

Give by Donor Advised Fund

Donor Advised Fund Administrator (examples: Fidelity, Schwab Charitable, Morgan Stanley GIFT, etc)

Donor Advised Fund Name: _____

**We advise that you recommend your grant by July 1 to ensure its receipt by the Tin Cup giving deadline.*

Give Stock

Which institution or bank is initiating the transfer? _____

Please list name, ticker, and number of shares for each security being transferred*

(example: Exxon XOM 100 shares)

Stock name	Stock ticker	Number of shares
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_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Stocks value estimate: _____

If there is a difference between your estimated gift total and the actual net sales proceeds, please list the organizations from where funds should be added/deducted:

Add any excess funds to this organization: _____

Deduct any deficit of funds from this organization: _____