



## Stock Transfer Instructions

To transfer stock to the Pikes Peak Community Foundation, please provide your investment manager the instructions below. Please note: it is *extremely important* that you notify the Community Foundation when transferring securities into this account so that we may credit your gift to the appropriate fund at the Foundation. Please see below for instructions pertaining to the transfer of public securities to the Foundation.

### What We Need from You

We will need the following information from you when you notify us of an impending stock transfer:

- Your name and contact information
- Your Investment Manager's name and contact information
- Name and quantity of shares to be transferred
- Anticipated date of transfer
- Fund to which proceeds are to be attributed

Please notify Leslie Middleton, Director of Finance, ([lmiddleton@ppcf.org](mailto:lmiddleton@ppcf.org) or 719-445-0603) of a stock transfer.

### Information for Your Investment Manager

Share the following directions with your Manager to successfully complete a transfer of stock to the Community Foundation:

Morgan Stanley Wealth Management  
DTC: 0015  
Acct.: 320-112968  
Acct. Name: Pikes Peak Community Foundation

For help, contact Shari Losinski ([shari.l.losinski@morganstanley.com](mailto:shari.l.losinski@morganstanley.com) or 719-577-6326)  
121 S. Tejon St. #700  
Colorado Springs, CO 80903  
[Shari.L.Losinski@morganstanley.com](mailto:Shari.L.Losinski@morganstanley.com)



## External Stock Transfer Notification Form

Thank you for utilizing the Pikes Peak Community Foundation as the vehicle for your philanthropic giving. Please fill out this form for **each** stock transfer and return to Leslie Middleton, Director of Finance, to properly initiate the completion of your stock gift.

### Donor Information

Name

Address  
City, State, Zip Code

Phone

Email

### Gift Information

Name/quantity of shares being transferred

Anticipated date of transfer

### Investment Manager Information

Name

Address  
City, State, Zip Code

Phone

Email

Fax

### Receiving Organization Information

Organization Name

Address  
City, State, Zip Code

Contact Person Name

Phone

Email