



Stock Transfer Instructions

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.

What we need from you

Please fill out the accompanying “Stock Transfer Notification Form” and send directly to Libby Ebeling, Philanthropy Associate, at Pikes Peak Community Foundation – Lebeling@ppcf.org.

Information for your investment manager

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

Morgan Stanley Wealth Management

DTC: 0015

Account: 320-112968

Account Name: Pikes Peak Community Foundation

Please notify Libby Ebeling, Philanthropic Services Associate, of any stock transfers

Libby Ebeling

Philanthropic Services Associate

719-445-0601

lebeling@ppcf.org

If you need assistance from Morgan Stanley, please contact

Shari Losinski

The Jensen Group, Morgan Stanley

719-577-6326

shari.l.losinski@morganstanley.com



External Stock Transfer Notification Form

Thank you for using Pikes Peak Community Foundation as the vehicle for your philanthropic giving. Please fill out this form for **each** stock transfer and return to Libby Ebeling, Philanthropy Associate, Lebeling@ppcf.org, to initiate the completion of your stock gift.

Donor Information

Name:

Address:

City, State, Zip Code:

Phone:

Email:

Gift Information

Name of stock/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: