



## 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 Max Cupp, Director of Philanthropic Services, at Pikes Peak Community Foundation – [mcupp@ppcf.org](mailto:mcupp@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 Max Cupp, Director of Philanthropic Services, of any stock transfers

#### **Max Cupp**

Director of Philanthropic Services

719-445-0609

[mcupp@ppcf.org](mailto:mcupp@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](mailto: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 Max Cupp, Director of Philanthropic Services, [mcupp@ppcf.org](mailto:mcupp@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: