



## 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 Alex McCreary-Ellis, Philanthropic Services Associate, at Pikes Peak Community Foundation – amccreary-ellis@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 Alex McCreary-Ellis, Philanthropic Services Associate, of any stock transfers

#### **Alex McCreary-Ellis**

Philanthropic Services Associate

719-445-0601

amccreary-ellis@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 Alex McCreary-Ellis, Philanthropy Associate, [amccreary-ellis@ppcf.org](mailto:amccreary-ellis@ppcf.org), to initiate the completion of your stock gift.

### **Donor Information**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

### **Gift Information**

Name of stock/quantity of shares being transferred: \_\_\_\_\_

Anticipated date of transfer: \_\_\_\_\_

### **Investment Manager Information**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

### **Receiving Organization Information**

Organization Name: \_\_\_\_\_ Pikes Peak Community Foundation

Receiving Fund Name: \_\_\_\_\_

Address: \_\_\_\_\_ 315 E. Pikes Peak Avenue, Ste. 120

City, State, Zip: \_\_\_\_\_ Colorado Springs, CO 80903

Phone: \_\_\_\_\_ 719-445-0601

Email: \_\_\_\_\_ [amccreary-ellis@ppcf.org](mailto:amccreary-ellis@ppcf.org)