



How to Make a Gift of Stock

IMPORTANT

As soon as possible after taking one of the below steps, please contact Laurie Lowy, Accountant, or David Morrissey, Controller (contact information below), and let one of them know the arrangements you have made, including the name and number of shares you are contributing. Contacting the VCF prior to your gift transaction ensures that we attribute it correctly – a broker may execute a transfer of stock to the VCF account without a donor's name.

1. If your securities are held in “street name” at a brokerage firm or bank:
 - Have your broker or trust officer contact us about your gift. Shares can be wired to Lucinda Bain at the Morgan Stanley office in Colchester, Vermont (1-800-446-0193) by authorizing transfer to:

Morgan Stanley
DTC 0015
FAO: 383-028320-210
FBO: The Vermont Community Foundation

2. If your securities are held in a Morgan Stanley Account:
 - Send written authorization to your account executive to journal the gift from your Morgan Stanley account to:

FAO 383-028320-210
FBO: The Vermont Community Foundation

3. If you hold the actual stock certificate(s):
 - Send the unendorsed certificate(s) (by certified mail if you prefer) to:

The Vermont Community Foundation
Attention: David Morrissey, Controller
3 Court Street
Middlebury, VT 05753

- In a separate envelope, mail a signed stock power form, with your signature guaranteed by a commercial bank or brokerage firm, by ordinary first class mail to the same address as the certificate. Stock power forms can be obtained from your bank or brokerage firm. Include a brief letter stating that the securities are a gift to the VCF. We use the letter as authorization to deposit the securities directly into our account.

If you have any questions about how to donate securities to the VCF, don't hesitate to call:

Laurie Lowy, Accountant – lloy@vermontcf.org 802-388-3355 x237

David Morrissey, Controller – dmorrissey@vermontcf.org 802-388-3355 x228