



### **Electronic Transfer Instructions for Stock Gifts**

We appreciate your interest in making a gift of securities to The Community Foundation *for* Greater New Haven. Following the instructions below will help ensure that your gift is processed in a timely manner and accurately directed to your desired use.

1. Prior to transferring shares, please contact The Community Foundation and provide the following information:
  - a. Name of your broker and firm assisting with the transfer
  - b. Stock name and number of shares
  - c. How you would like this gift to be used (i.e., the fund or purpose to which the gift should be directed)
2. Please advise us, directly or through your broker, when the stock transfer is complete. Once the gift is received and processed by The Community Foundation, a gift acknowledgement letter will be sent to you.

#### **The Community Foundation *for* Greater New Haven Contact Information:**

The contact at The Community Foundation for notifications, questions and information is:

Ms. Linda Estacion  
Director of Donor Services and Development Operations  
Phone Number: 203-777-7069  
Email: [lestacion@cfgnh.org](mailto:lestacion@cfgnh.org)

#### **The Community Foundation *for* Greater New Haven Brokerage Account Options:**

Merrill Lynch/Bank of America  
Account Number: 81204182  
DTC Number: 8862  
Contact Person: Alex Santacroce  
Phone Number: 203-789-2405  
Fax Number: 203-826-2248

UBS  
Account Number: LH39063 14E  
DTC Number: 0221  
Contact Person: Denise Rasicot  
Phone Number: 203-498-3327  
Fax Number: 855-249-2312

For additional options, contact Linda Estacion.