



Electronic Transfer Instructions for Stock Gifts

We appreciate your interest in making a gift of securities to the Valley Community Foundation. The Valley Community Foundation's (VCF's) funds are invested and managed by The Community Foundation *for* Greater New Haven (TCF). Please follow the instructions below to 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 VCF 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 VCF, 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 by the Valley Community Foundation.

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, Donor Services and Development Operations
Phone Number: 203-777-7069
Fax Number: 203-787-6584
Email: 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: Elizabeth Hartmayer
Phone Number: 203-789-2470
Fax Number: 203-635-4535

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 Sharon L. Closius, President/CEO
sclosius@valleyfoundation.org
(203) 751-9162