



One Valley Community Foundation
1627 W. Main St. Box 404
Bozeman, MT 59715

406-587-6262
info@onevalley.org
www.onevalley.org

Transfer of Stock Form

To transfer stock as a donation to the One Valley Community Foundation, please provide your broker the following instructions:

Financial Advisor's Name: _____

Brokerage Firm Name: _____

Broker's Address: _____

Your Account No.: _____

Account Registration: _____

Subject: Stock Gift Transfer

Dear Broker:

Accept this letter as a request and authorization to execute the following stock gift transfer of shares from the above referenced account. Please deliver these shares to the broker for the One Valley Community Foundation as follows:

Security Name/Ticker: _____

Number of Shares: _____ Approximate Value: _____

Date of Transfer: _____

Fund Designation for this gift: _____

(Please note: The date of your gift will be the date the stock is titled in the Community Foundation's name or is transferred to our account)

D.A. Davidson & Co.

DTC & OCC clearing number: 0361

Further Credit A/C # to 3482-3825

For Benefit Of: One Valley Community Foundation (DBA Bozeman Area Community Foundation)

The Federal ID number for the One Valley Community Foundation is 81-0519514. If you have any questions, please contact Jennifer Owens at 406-587-6262 ext. 40 at the One Valley Community Foundation. Thank you for your stock gift!

Sincerely,

Owner Signature*

Co-Owner Signature*

*All authorized fund holders must sign

Please Note: It is extremely important that you notify the Community Foundation when transferring securities into this account so we may credit your gift to the appropriate charitable fund. Securities cannot be sold until the donor has been identified. Additionally, your name and address are required for tax deduction and acknowledgement purposes. Please email a copy of these instructions to jennifer@onevalley.org attn: Jennifer Owens. Thank you!