



**Donated Securities Transfer Form  
Qualified Charitable Distribution Form**

*Please complete this form to help with the transfer of assets to the Community Foundation of Boone County.  
We appreciate your contribution!*

Donor Name \_\_\_\_\_

Donor Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Contact Name & Phone \_\_\_\_\_

Name of Security \_\_\_\_\_

Number of Shares/Units \_\_\_\_\_

Date of Gift \_\_\_\_\_ High and Low Value/Share \_\_\_\_\_

High and Low Value on Date of Transfer \_\_\_\_\_

**The broker or asset custodian will need the following information to send us the securities:**

**DTC Eligible Transfers:**

Code 40  
DTC #0164  
Charles Schwab & Co., Inc.  
Attn: Transfer of Accounts  
101 Montgomery Street  
FBO: Community Foundation of Boone Co.  
Acct# 9763-3941

**Physical Delivery of Certificates:**

Charles Schwab & Co., Inc.  
Attn: ISTW1  
2423 East Lincoln Drive  
Phoenix, AZ 85016-1215  
FBO: Community Foundation of Boone Co.  
Acct# 9736-3941

\_\_\_\_ **Restricted Gift**, Fund Name \_\_\_\_\_

\_\_\_\_ **Unrestricted Gift** (Community Foundation may use for its most immediate needs)

**Send Completed Form to:**

Jodi Gietl, President/CEO  
102 N. Lebanon Street, Suite 200, Lebanon, IN 46052  
[jodi@communityfoundationbc.org](mailto:jodi@communityfoundationbc.org) Phone: 765-482-0024