



**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:

CFBC
102 N. Lebanon Street, Suite 200, Lebanon, IN 46052
info@communityfoundationbc.org Phone: 765-482-0024