



Stock Transfer Instructions

To be completed by the donor or their financial advisor

IMPORTANT: Please complete this form to notify Rose Community Foundation of an upcoming stock transfer so the gift can be verified and acknowledged appropriately. Contact: Emma Schwarz at eschwarz@rcfdenver.org or 303.398.7431.

Date:

Donor Information:

Name
Address
City/State/Zip
Phone/ Email

Financial Advisor / Institution:

Firm Name
Contact Name
Phone/ Email

Securities Donated:

Number of shares:

Type of Stock (Name):

Please attach additional sheets as necessary.

Fund at Rose Community Foundation / Purpose

Fund Name
Notes/Special Instructions

TRANSFERRING SECURITIES TO ROSE COMMUNITY FOUNDATION

Electronic Delivery through Depository Trust Company (DTC)

Receiving Brokerage	RBC Wealth Management
DTC ID#	0235
Account name	Rose Community Foundation
Account number	30752030
RCF Tax ID #	84 – 0920862

LIQUIDATION POLICY

Donated securities are generally sold as soon as practicable after receipt and verification. Donors are responsible for valuation. The Foundation will acknowledge the date on which the securities are received in the Foundation's brokerage account along with security name and the number of shares.