



Stock Transfer Gift Procedures

- Donors should contact the Community Foundation and inform us of their intention to donate stock and which fund the proceeds should be credited to.
- For stock held in a brokerage account, donors should contact their brokerage company. Transfer of stock to the Foundation should be made through:

M&T Brokerage, Attention Vincent Mazzearella
DTC#0227
Account#01D-035807

(Note: Vincent Mazzearella's phone number is 607-274-8910 or 800-724-5445. His address is 118 North Tioga Street, Ithaca, NY 14850)

- If the donor is contacting their brokerage company by letter, it should read:

I would like to donate (name of stock and # of shares) to the Community Foundation of Tompkins County.

Stock may be transferred to the Foundation through:
M&T Brokerage, Attention Vincent Mazzearella
DTC#0227
Account#01D-035807

I relinquish all rights, privileges and dividends on this stock..

The proceeds of this stock should be credited to the _____ Fund at the Community Foundation.

- If the donors have a stock certificate, they should call us for further details.

Any questions may be directed to Wendy Bakal, Community Foundation of Tompkins County 607-272-9333 or info@communityfoundationoftc.org