



CENTRAL NEW YORK  
COMMUNITY  
FOUNDATION, INC.

**Where the Smart Money Gives.**

**CENTRAL NEW YORK COMMUNITY FOUNDATION, INC.  
INSTRUCTIONS FOR GIFTS OF SECURITIES**

Very often, donors find it is to their advantage to make a gift of appreciated stock to the Community Foundation. When making gifts of securities, please follow these simple instructions:

1. Give your broker written instructions about the securities you wish to transfer to the Community Foundation. Please include the number and name of the shares, the name of the donor, and to which fund you would like the shares to be credited.
2. Provide your broker the following information to be used when transferring securities to the Community Foundation:

DVP #0418  
Morgan Stanley Smith Barney  
Account # 687-11449-18-005  
Central New York Community Foundation, Inc.  
Phone instructions: Phone customer – 315 422-9538,  
Attn: Mary Meyer

Please contact Mike or Ted Rulison at 315 448-3400 with information on securities being transferred.

3. Call 315 422-9538 or email the Community Foundation to let them know that a stock transfer is in process, the name and number of shares and the fund to which the shares should be credited. This will ensure that the securities are credited to the correct fund.  
Peter Dunn, Ext 211 or [peter@cnycf.org](mailto:peter@cnycf.org)  
Mary Meyer, Ext 212, or [mary@cnycf.org](mailto:mary@cnycf.org)  
Jennifer Owens, Ext 213, or [jenn@cnycf.org](mailto:jenn@cnycf.org)

Thank you!