



**CONTRIBUTING STOCK to the
COMMUNITY FOUNDATION OF GREATER DUBUQUE
through American Trust and Savings Bank**

ELECTRONIC TRANSFER

In order to electronically contribute stock to the Community Foundation, you will need to furnish your broker with a couple of numbers in order for the stock to be transferred.

Bank of New York Mellon - DTC 901
Custodian Account 186691
FBO the Community Foundation of Greater Dubuque, Dubuque, Iowa

Please use this procedure for stock transfers only. When you initiate the transfer, please notify your donor advisor at CFGD via e-mail or call CFGD at 563-588-2700 so that we can anticipate the transfer.

Items that the Community Foundation will need to anticipate and process your gift:

- Stock Name
- Number of shares
- Approximate value
- Donor name and address
- Fund(s) the gift is benefiting

STOCKS HELD IN CERTIFICATE FORM

To gift the Community Foundation stock in certificate form, a stock power form must be filled out and signed by the donor. The donor must sign and date it in front of a signature guarantor (usually done at the donor's bank). The information that needs to be filled out on the form are the number of shares, type of stock (i.e., common or preferred), name of the stock, and certificate number(s). After the donor has signed the stock power and had their signature guaranteed, they give the stock power and certificate to the Community Foundation.

FOR GIFTS OF MUTUAL FUNDS, call your CFGD donor advisor or the CFGD Finance Department at 563-588-2700 and we will gather the information needed to work directly with your fund advisor or the mutual fund company to accomplish the transfer.