

**TD Ameritrade**

Phone: (800) 669-3900

FAX (866) 468-6268

**Send Duplicate Instructions To:**

Fax (231) 722-4616

OR email to: [ann@muskegonfoundation.org](mailto:ann@muskegonfoundation.org)RE: GIFT OF SECURITIES

---

*The individual(s) listed below will be making a gift of securities to:***THE COMMUNITY FOUNDATION for MUSKEGON COUNTY**Including affiliated Community Foundation for Mason County, and  
Community Foundation for Oceana County

DONOR NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_  
\_\_\_\_\_

PHONE: \_\_\_\_\_

NAME OF SECURITY: \_\_\_\_\_

QUANTITY: \_\_\_\_\_ # of shares

DELIVERING FIRM: \_\_\_\_\_

BROKER CONTACT:  
NAME: \_\_\_\_\_

PHONE: \_\_\_\_\_

*Either the individual named above or their broker will be contacting you to coordinate the transfer of the securities.*

---

**BROKER DELIVERY INSTRUCTIONS:***(DTC eligible securities only. For all other types of securities contact Ann VanTassel at 231-332-4115)***TD Ameritrade****P.O. Box 2760****Omaha, NE 68103-2760****OR via Fax: (866) 468-6268****DTC# 0188**Account Number: **868363020**

Account Name: Community Foundation for Muskegon County

**PLEASE NOTE ANY RESTRICTIONS ON GIFTS BELOW:**

Foundation Name: \_\_\_\_\_

Fund Name: \_\_\_\_\_

Other: \_\_\_\_\_

**Send Duplicate Transfer Instructions To:** Fax (231) 722-4616 OR email [ann@muskegonfoundation.org](mailto:ann@muskegonfoundation.org)