

**TD Ameritrade**

Phone: (800) 669-3900

FAX (866) 468-6268

**Send Duplicate Instructions To:**

Fax (231) 722-4616

OR email to: [avantassel@cffmc.org](mailto:avantassel@cffmc.org)

RE: GIFT OF SECURITIES

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*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, Community Foundation for Oceana County, and Manistee County Community Foundation

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.*

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**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: \_\_\_\_\_

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