



**Memorandum**

**Date:**

**Re:** Stock or Wire Transfer to the Community Foundation of Jackson Hole

**Phone:** 307-739-1026

**Fax:** 307-734-2841

Thank you for your interest in making a charitable gift to the Community Foundation of Jackson Hole. The information your broker or banker will need to transfer stock or wire funds is noted below along with the information we will need to properly enter and acknowledge your contribution.

Please fax this form to 307-734-2841 or email to [donorservices@cfjacksonhole.org](mailto:donorservices@cfjacksonhole.org).

**Please provide your broker/banker with the following information:**

*For Direct Stock Transfers*

*For Cash Wire Transfers*

Charles Schwab & Co, Inc.  
 P.O. Box 628291, Orlando, FL 32862  
 DTC: 0164, Code 40  
 Account Number: 6132-2009  
 Account Name: Community Foundation  
 of Jackson Hole

Rocky Mountain Bank  
 890 West Broadway, Jackson, WY 83001  
 ABA Routing Number: 102305098  
 Account Number: 104509906  
 Account Name: Community Foundation  
 of Jackson Hole

David Elan or Liza Millet: 307-733-5100

Phone: 307-739-9000

**Please provide the Community Foundation with the following information:**

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

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Date of Transfer Request: \_\_\_\_\_

Is this gift anonymous? Yes \_\_\_\_\_ No \_\_\_\_\_

Stock Name: \_\_\_\_\_

# of Shares: \_\_\_\_\_

Broker Name: \_\_\_\_\_

Broker Phone: \_\_\_\_\_

Is this an Old Bill's Fun Run Gift?

\_\_\_\_\_ No. Please indicate recipient fund name: \_\_\_\_\_

\_\_\_\_\_ Yes. Please indicate your designations below by percent, shares or specific amount(s).

*If listing fixed amounts, please note where any difference between the estimated gift total and the net sales proceeds should be added/deducted. Net sales variance: \_\_\_\_\_*

1. \_\_\_\_\_, %/#!/\$ \_\_\_\_\_ 2. \_\_\_\_\_, %/#!/\$ \_\_\_\_\_

3. \_\_\_\_\_, %/#!/\$ \_\_\_\_\_ 4. \_\_\_\_\_, %/#!/\$ \_\_\_\_\_

5. \_\_\_\_\_, %/#!/\$ \_\_\_\_\_ 6. \_\_\_\_\_, %/#!/\$ \_\_\_\_\_