



Asset Transfer Instructions

Charles Schwab

DTC 0164, Code 40

Foundation Account - 5897-9425

Before the gift is made, please notify the Foundation at 303-678-6555 or email Eric Hozempa at eric@longmontfoundation.org or Lisa Tatusko at lisa@longmontfoundation.org. Please provide the following so we can properly credit the correct fund:

1. Name of the donor who is making the gift
2. Stock, mutual fund or bond information (Number of shares and name of company - Ticker Symbol(s) if possible)
3. The name of the fund that should be credited for the gift

We will notify you when the asset transfer is complete and will provide a tax receipt when the gift is entered. Please reach out with any additional questions