



## Directions for Giving Securities to Middlesex County Community Foundation

**To donate securities held by your broker**, the following information will be needed by your broker. When you notify your broker, please also notify us that we should be expecting a transfer to our account at Merrill Lynch. Please call Cynthia H. Clegg at 860-347-0025.

Securities may be transferred to:

Merrill Lynch DTC 5198 for Middlesex County Community Foundation Account # 5VZ-02138.

- The office is **Merrill Lynch**, 100 Middlesex Plaza, Middletown, CT 06457, 860-347-4491.
- The Community Foundation's broker is Richard Gibbons 860-343-8304 or 860-347-4491 x8304.

Middlesex County Community Foundation's Federal I.D. number is 06-1477711

If you notify your broker in writing, please send a copy of the letter to your broker to:

Cynthia H. Clegg, President & CEO  
Middlesex County Community Foundation  
211 South Main Street  
Middletown, CT 06457-0025  
Or email to [Cynthia@MiddlesexCountyCF.org](mailto:Cynthia@MiddlesexCountyCF.org)

**Date of Gift:** When making a gift of securities to Middlesex County Community Foundation in this manner, the official date of the gift is the date on which stock is received in the Middlesex County Community Foundation account.

**If you hold the securities**, send the unendorsed certificates with a letter giving your name and address by registered mail to:

Middlesex County Community Foundation  
211 South Main Street  
Middletown, CT 06457-0025

A stock power **with only your signature (preferably guaranteed) filled in**, must be sent in a separate envelope by first class mail to the above name and address. (Each stock certificate requires a separate stock power.)

**Date of Gift:** When making a gift of securities to the Middlesex County Community Foundation in this manner, the official date of the gift is the later postmark date of the two envelopes sent to the Middlesex County Community Foundation.

**Valuation:** The value of the stock is the average of the reported high and the reported low on the date of gift. Acknowledgements are sent for all gifts.