



1000 Adams Street, Suite 200 | Bay City, MI 48708 | Tax ID: 38-2418086

## Donating a Gift of Stock to the Bay Area Community Foundation

Each individual, family, or organization we work with has unique charitable interests and financial circumstances. The Bay Area Community Foundation offers a variety of giving methods tailored to your unique situation.

Bay Area Community Foundation can accept gifts in the form of cash, check and credit card. We also accept gifts of publicly traded marketable securities which include stocks, bonds and U.S. Government securities.

Date of Gift \_\_\_\_\_

Name of Donor \_\_\_\_\_

Address of Donor \_\_\_\_\_

Name of Stock \_\_\_\_\_

CUSIP \_\_\_\_\_ Number of Shares Being Donated \_\_\_\_\_

Name of Financial Institution Sending Gift \_\_\_\_\_

### For Gifts of Stocks or Bonds delivery instructions are:

<b>Receiving Firm Name:</b>	Fidelity Investments
<b>DTC Number:</b>	0226
<b>Agent Account Number:</b>	676-186507
<b>Further Credit to:</b>	Midwest Trust Company
<b>Receiving Account Title:</b>	Bay Area Community Foundation
<b>Receiving Account Number:</b>	38040000824
<b>Contact Name:</b>	Adam Engel
<b>Phone Number:</b>	(989) 921-0010

Please notify us in writing of the gift and indicate in the letter which endowment fund you would like credited with the gift. This will help ensure your gift is properly received and acknowledged.

**Send correspondence to:** Sue Jensen, Director of Finance  
Pere Marquette Depot  
1000 Adams Street, Suite 200  
Bay City, MI 48708  
suej@bayfoundation.org

For more information about other ways of giving such as bequest by will, charitable gift annuity, charitable remainder trust, charitable lead trust or designating Bay Area Community Foundation as the beneficiary of a life insurance policy or retirement plan, please contact Diane Fong, President & CEO at (989) 893-4438.