



INSTRUCTIONS FOR PROCESSING STOCK DONATIONS

Please send stock donations to the investment broker listed below with a transfer cover letter stating that the gift of (number) of shares of (name) stock is a contribution to The Community Foundation for South Central New York, Inc. Please also notify the Community Foundation of the gift and any specific instructions for the placement of the gift (specific fund or Community Fund).

The firms listed below have standing instructions to sell immediately and send the proceeds to the Community Foundation per the Foundation's policy. Donors will receive a letter acknowledging the gift which includes the date the stock was received, the name of the stock and the number of shares. Donors should consult their tax advisors for assistance in valuing their donation. Donors who contribute to donor advised funds will also be given the value of the net proceeds, which is not for tax purposes.

If you have **original stock certificates** in your possession, please DO NOT fill out the back of the certificate; instead just sign on the signature lines.

If you have any questions or need further assistance, please contact Darlene Cempa, Finance Officer, or Diane Brown, Executive Director, at (607) 772-6773.

Stock Donations under \$50,000

NBT Financial Group
3121 Vestal Parkway East
Vestal, NY 13850

Contact Person – Jessica Blake – (607) 797-3315 jblake@nbtbank.com

Agent - The Northern Trust Company

DTC# 2669 Custodian Account: 1746316

Recipient Account: The Community Foundation for South Central NY, Inc. Account: 00A798

Or

Stifel, Nicolaus & Company, Inc.
122 State Street – 1st Floor
Binghamton, NY 13901

DTC# 0793

Account: 2635-7364

Stock Donations over \$50,000

Graystone Consulting
300 Linden Oaks
Rochester, NY 14625

Contact Person – Theresa Kenyon (585) 389-2271 Theresa.C.Kenyon@msgraystone.com

DTC# 0015

Account: 881-111619-246