



HARRISONBURG-ROCKINGHAM

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The donor initiates the transfer of securities with their broker. To transfer stock to The Community Foundation of Harrisonburg & Rockingham County, please give your broker the instructions below. Before the transfer, please email Revlan Hill, revlan@tcfhr.org and Angela Moats, angela@gllwealth.com, or Kara Morgan, kara@gllwealth.com, to provide the following information:

- ASSET(S) TRANSFERRED
- NUMBER OF SHARES
- YOUR NAME
- YOUR MAILING ADDRESS

If you have questions, Angela Moats at Graves Light Lenhart Wealth can be reached at (540)433-3076. Thank you for your gift.

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SUBJECT: STOCK GIFT TRANSFER

Dear Broker:

It is important to note that appreciated shares should be transferred "in-kind" and not liquidated. Please deliver these shares to the broker for The Community Foundation of Harrisonburg & Rockingham County as follows:

Charles Schwab **DTC #0164**
Account # [REDACTED] Call Revlan Hill at TCF for this information 432-3863
The Community Foundation of Harrisonburg & Rockingham County (EIN# 54-1920746)
Attn: Angela Moats

ASSET DESCRIPTION: _____

NUMBER OF SHARES: _____

DATE OF TRANSFER: _____

Please note that we will acknowledge and date your gift based on the value of the securities on the date of transfer to TCF. This information is used for tax records.

Please contact Revlan Hill at the Community Foundation by email at revlan@tcfhr.org or by phone at (540)432-3863, before transferring securities into this account to ensure the gift is properly credited to the appropriate fund.
