

# Sample Broker Letter

Date

Donor's Broker Name  
Donor's Broker Firm  
One Main Street  
City, State, Zip

Dear **(Insert Broker Name)**:

This letter is to authorize you to deliver **(Insert number)** shares of **(Insert name of company)** stock from my account number \_\_\_\_\_ to the Community Foundation of Harford County. I will be calling to ensure the transfer has taken place.

The information that you will need to make this transfer is as follows:

Deliver to: Wells Fargo Advisors, 2 South Main Street, Bel Air, Maryland 21014  
ATTN: Marge Nagel  
Contact Phone: 638-9333 or toll free 800-688-9334  
DTC #: 0141  
Receiving Account: #3894-0553  
Receiving Account Name: Community Foundation of Harford County, Inc.  
Tax I.D. #: 01-0880770

This gift of stock is for: **(select appropriate response)**

- \_\_\_\_\_ **(Insert Name)** Component Fund
- \_\_\_\_\_ CFHC Unrestricted Fund
- \_\_\_\_\_ CFHC Administrative (operating) Fund

I understand my gift of stock is irrevocable and becomes an asset held by the Community Foundation Harford County, which maintains full fiduciary responsibility and ownership of this gift.

If you have any questions, or need more information, call me.

Joe and Jane Donor

**cc: Community Foundation of Harford County, Attn: Development office, by fax at 410-776-2294.**