



**FOUNDATIONS IN EDUCATION**  
TRANSFORMING LIVES THROUGH EDUCATION

## **STOCK TRANSFER INSTRUCTIONS**

Gifts of stock may be made to Foundations in Education, Inc. through a brokerage account we maintain with Fidelity Investments for the purpose of processing your stock transfers.

To make a gift of stock to Foundations in Education for unrestricted support, Bishop's Scholarship Fund, Professional Development, Innovation and Leadership Grants or other donor directed purpose in keeping with Foundations in Education's mission, please complete Parts I and II of this form.

If your stock is held by a broker, please provide him/her the completed Part 1 form. Your broker will inform you of the requirements to execute your transfer of stock to Foundations in Education.

If the stock is held by you in certificate form and registered in your name(s), please contact Foundations in Education for receiving instructions at 203.416.1642.

### **PART I: NOTICE OF STOCK GIFT**

To Donor's Broker \_\_\_\_\_:  
*(Name of Donor's Broker)*

Please transfer \_\_\_\_\_ shares of \_\_\_\_\_ from  
(number of shares) (name of stock)

Account number \_\_\_\_\_ to:

Foundations in Education, Inc  
Account Number: Z48-769835  
DTC Number: 0226

Brokerage: Fidelity Investments  
1261 Post Road  
Fairfield, CT 06824  
203.255.7539

Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_

Date: \_\_\_\_\_

**DONOR, PLEASE COMPLETE PART II ON THE FOLLOWING PAGE.**



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**PART II: NOTICE OF STOCK GIFT TO FOUNDATIONS IN EDUCATION, INC.**

Name of individual  
or entity making the gift: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Phone: \_\_\_\_\_

Today's Date: \_\_\_\_\_

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

Quantity of Shares to transfer: \_\_\_\_\_

Donor's Broker/Agent: \_\_\_\_\_

Contact for Broker/Agent email: \_\_\_\_\_ phone: \_\_\_\_\_

Please complete and e-mail, or mail this completed Part II to the Foundations in Education Office in order ensure your charitable donation is properly credited and acknowledged to you as the donor of record.

Foundations in Education  
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Bridgeport, CT 06606

Holly@foundationsineducation.org

Telephone 203.416.1642