



## Socially Responsible Portfolio

The Eau Claire Community Foundation is pleased to be of assistance in carrying out your charitable goals through a gift of publicly traded stock. To ensure that your gift is promptly and properly administered, please contact us *prior to transferring the shares* to let us know the stock name and number of shares to be transferred.

Please provide the following information to your broker so that he or she may direct your thoughtful gift to the Community Foundation's account at The Northern Lights Group with Morgan Stanley in Minneapolis, MN:

### STOCK DELIVERY INSTRUCTIONS:

Firm Name:	Morgan Stanley
Account Title:	Eau Claire Community Foundation
DTC Number:	0015
Account Number:	364-049601-217

### FOR ASSISTANCE CONTACT:

Cassandra Torgerson / Greystone Consulting  
Morgan Stanley  
225 South Sixth St. Suite 5100  
Minneapolis, MN 55402  
Phone: 612-340-6720/ Email: [Cassandra.torgerson@ms.com](mailto:Cassandra.torgerson@ms.com)

*\*Please remember to request that the firm sending the stock gift put the donor's name on the transfer.*

It is the Community Foundation's policy to sell all shares upon receipt. The sale proceeds will be allocated to the charitable fund(s) or purpose(s) that you specify, and a formal acknowledgement of your gift (indicating the value of your gift for federal tax purposes) will be mailed to you. Thank you for your interest in using securities to support the charitable causes that have special meaning for you. **ECCF Tax Identification is 39-1891094.**

For more information contact: Sue Bornick, Executive Director  
Eau Claire Community Foundation  
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