



## **STOCK DONATION INSTRUCTIONS**

**Securities Transfer Instructions:** Please use the following instructions for making a tax-deductible gift of stock, bonds, or mutual fund shares to New Mexico Community Foundation (NMCF). Donors will receive formal acknowledgement and tax substantiation upon successful completion of a gift.

1. Call Carla Melendez, Finance Director, at (505) 356-4116 or email [cmelendez@newmexicofoundation.org](mailto:cmelendez@newmexicofoundation.org); or contact Dorothy Sanmann, Bank of Albuquerque Relationship Manager, at (505) 222-8583 or email [dsanmann@bokf.com](mailto:dsanmann@bokf.com) to inform us of the gift and provide the following information:
  - a. Name and Address of Donor
  - b. Anticipated date of transfer and brokerage information
  - c. Restrictions on the purpose of the gift, if any
  - d. Gifts received without information or designation will be deemed as unrestricted gifts to NMCF Operating Fund**
  - e. Name of security and number of shares
  - f. Special instructions, if any
2. For stocks to be delivered via DTC electronic transfer (preferred method), please transfer as follows:

Bank of Albuquerque, Trust  
Attn: Dorothy Sanmann  
(505) 222-8583  
[dsanmann@bokf.com](mailto:dsanmann@bokf.com)  
DTC #0901 – BNY Mellon  
Account # 016071 – Bank of Oklahoma, Trust  
FFC: 919005GC6 / NMCF Donation Account
3. For stocks to be delivered in certificate form, please call Dorothy Sanmann (Bank of Albuquerque) at (505) 222-8583 to make arrangements.