



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 Foundation (NMF). 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@nmcf.org; or contact Dorothy Sanmann, Bank of Albuquerque Relationship Manager, at 505.222.8583 or email 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 NMF 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

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.