Fund Contribution Instructions

All gifts that are made directly from a donor into a fund at the Community Foundation of the Ozarks will receive a gift acknowledgement. Credit card gift acknowledgements are provided via email immediately after the gift; all other gift acknowledgements are made by mail.

To Contribute via Check

- Make check payable to "Community Foundation of the Ozarks" or "CFO"
- Memo line should include the name of the fund you are contributing to
- Mail check to the CFO at: Community Foundation of the Ozarks, P.O. Box 8960, Springfield, MO, 65801

To Contribute via Credit Card or eCheck

- Credit card gifts may be received through the Community Foundation website: **cfozarks.org/donate**
- Use the search bar to look up the name of the fund; click on the name of the fund to begin the donation process

To Contribute via Wire Transfer/ACH

- Bank: Guaranty Bank
- Bank address: 2144 E. Republic Road, Springfield, MO 65807
- Organization name on account: Community Foundation of the Ozarks, Electronic Transfer Account
- Bank routing details (ABA): 086519421
- Account number: 7900068617
- Phone: 417-885-0556

> Need more info? Contact Anna Dowell, Director of Donor Services, at adowell@cfozarks.org or 417-864-6199.

To Contribute via Transfer of Stocks or Securities

- Before authorizing any transfers to the CFO, please notify CFO finance staff by emailing finance@cfozarks.org or calling 417-864-6199.
- Inform your financial advisor that you'd like to donate stock to the CFO. Your advisor will need to collect several pieces of information from you to complete your request. As a starting point, please be prepared to provide them with the following information:
  - Financial institution holding the receiving account: Morgan Stanley
  - Account registration for the CFO: Community Foundation of the Ozarks
  - DTC Number: 0015
  - Account Number: 573-022827
  - Phone number for Morgan Stanley: 417-882-7150
  - Contact name: Clark Creighton
  - Support staff to contact: Lori Tegarden, Sara Voss
  - Fax: 417-882-9744
  - Specific stock position and quantity of shares to be donated
  - Fund ID number or name of the charitable fund, or the name of the nonprofit to which donated funds should be directed
- Your advisor will likely require some form of written authorization to complete this request and will advise you of what is needed. Please monitor for and complete any signatures or authorizations required by your advisor.
- Once authorized by you and initiated by your advisor, the transfer generally occurs within one to three business days. When the position leaves your account, you should be able to verify quantity as well as identifying information for the position from within your account activity. Shares will be liquidated and proceeds will be directed to the specified charitable fund or nonprofit.