

**The Lakeland Foundation  
Intention to Donate Stock/Securities**

Gifts of stock or securities should be made through your financial adviser or institution. When you transfer securities to The Lakeland Foundation, we sell them and use the proceeds for areas of greatest need, scholarships, program support, or for specific Lakeland Foundation funds as designated by you. When no specific designation is indicated, your gift will support the Foundation's area of greatest need.

Please complete this form so we can ensure proper designation and receipt of your gift, and then provide your financial adviser or institution with the transfer instructions detailed below to initiate a transfer of stock.

Your Name: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone/Cell: \_\_\_\_\_ Email: \_\_\_\_\_

Lakeland Foundation fund or purpose to which this donation should be directed, if any:

\_\_\_\_\_

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

Number of Shares: \_\_\_\_\_

CUSIP Number (if known): \_\_\_\_\_

Date of Transfer Request: \_\_\_\_\_

**For your Adviser, Brokerage, or Financial Institution:** To initiate a stock transfer, you must provide your financial adviser or institution with the following information.

**KEY BANK**

ACCOUNT NUMBER: 2177230 / ACCOUNT NAME: LAKELAND FOUNDATION - STOCK GIFT M/AG

**DTC ELIGIBLE SECURITIES:**

Deliver via DTC  
Key Bank NA Participant # 2205  
Reason Code 40  
FBO (LAKELAND FOUNDATION - STOCK GIFT M/AG) (2177230) \*

**FED BOOK ENTRY SECURITIES:**

Deliver via FED  
KeyBank NA ABA # 041001039 / 1050 \*  
(LAKELAND FOUNDATION - STOCK GIFT M/AG) (2177230) \*  
\* Please note Fed Securities should be directed to 1050

**CASH BALANCES:**

By Wire: Key Bank/Cleveland, Ohio  
ABA #041001039 Acct #5064 Cash Processing  
Attn: (SANDY KUBIT) (LAKELAND FOUNDATION - STOCK GIFT M/AG)(2177230)

[Click Here to download these instructions as a pdf.](#)