

**How to Donate Gifts of Securities (stocks and bonds) or mutual funds**

The following is the information necessary for wiring gifts of stock directly to the Colorado Historical Foundation’s account at UMB Private Wealth Management, which accepts gifts of marketable securities and also holds the Colorado Historical Foundation’s restricted funds. The Foundation is a charitable 501 (c) 3 organization incorporated in Colorado.

Before transferring, Please contact **Catherine Stroh, at (303) 894-2503 x2 or [catherine@cohf.org](mailto:catherine@cohf.org) AND Paul Krebs at (816) 860-3672 or [paul.krebs@umb.com](mailto:paul.krebs@umb.com)** to confirm we can accept what you wish to transfer. You will need to provide:

1. Donor’s name and mailing address for acknowledgement
2. Type of stock
3. Number of shares
4. Intended use of gift (if applicable). Unspecified gifts will be assumed for unrestricted support of the Colorado Historical Foundation’s mission.

**Mutual Funds:** Prior to transferring, confirm first if we can accept the fund, and then wait for a bin number assignment and any other special instructions from UMB.

**Electronic Stock Transfer Information:**

**Broker:** UMB Private Wealth Management  
 Attn: Paul Krebs  
**Address:** 1670 Broadway  
 Denver, CO 80202  
**(816) 860-3672** and [paul.krebs@umb.com](mailto:paul.krebs@umb.com)

**Account Information: DTC Eligible Securities**

<b>Participant ID</b>	2663
<b>Institution ID</b>	78810
<b>Agent Bank</b>	78810
<b>Agent Bank ID A/C No.</b>	90430D
<b>Interested Party ID</b>	64728
<b>Interested Party ID A/C No.</b>	Custody Colorado Historical Foundation-14332102
<b>Tax ID #</b>	84-6043555

**To ensure the gift is processed expeditiously, it is important that you communicate to us the donor’s name, the quantity and name of stock(s) to be transferred. A gift acknowledgement will be sent to the donor’s address provided to the Colorado Historical Foundation.**

*Thank you! Your support and generosity are greatly appreciated.*