



**Billings Community Foundation (BCF)  
Stock Transfer to First Interstate Investment Services**

Many gifts of appreciated securities such as stocks, bonds and mutual funds provide a charitable deduction for the full fair market value of the donated asset and, if you have owned them longer than one year, you may pay no capital gains tax on the transaction.

If your gift is intended to qualify for the Montana Endowment Tax Credit, please contact the Billings Community Foundation Executive Director, Lauren Wright, at 406-839-3334 or email [lwright@billingscommunityfoundation.org](mailto:lwright@billingscommunityfoundation.org).

Start the Planned Giving process [HERE](#).

**Information for your financial advisor:**

**First Interstate Wealth Management**

**RANDY PORTER**

**INVESTMENT SPECIALIST**

First Interstate Investment Services

(406) 255-6106

[Randy.Porter@fiwnwealth.com](mailto:Randy.Porter@fiwnwealth.com)

**Securities - Investment Name:** \_\_\_\_\_

**Cost Basis (if known):** \$ \_\_\_\_\_

**LPL DTC# 0075**

**Account # corresponding to your charity of choice.**

If a non-profit endowment account already exists with the Billings Community Foundation at **FIRST INTERSTATE** Investment Services, we can provide that account number. If the account does not exist yet, please designate funds to the Billings Community Foundation Main Account and we will move it to the newly created account from there.

Please notify the Billings Community Foundation if you choose to donate a gift of stock, as electronic stock transfers usually come to us without any donor identification.

**\*\*Do not instruct your broker to sell on the behalf of the Billings Community Foundation.**