



**Ithaca Public Education Initiative**  
**[www.ipei.org](http://www.ipei.org)**

To: Supporters of IPEI  
From: Steven Manley, Executive Director  
Subject: Instructions for the transfer of securities representing  
contributions made payable to IPEI (16-2506703)

Thank you for your expressed interest in donating securities to IPEI. We are pleased to be able to provide this convenient option through Tompkins Financial Advisors, the firm that currently manages IPEI's investments. If you have not already done so, please discuss with me your intentions prior to the transfer of any gifts to IPEI, [ipei@ipei.org](mailto:ipei@ipei.org), 607-256-IPEI (4734).

Notice must be given to Bill Murphy, Wealth Advisor, prior to the transfer of any gifts to IPEI. His phone number is 607-273-0037. He will be happy to coordinate the transfer with you. Your advance notification to Tompkins Financial Advisors should include your name, the number of shares, and the name of the stock.

Please let Bill Murphy know if a physical stock certificate will be presented or if it will be transferred electronically. The gifted stock will be deposited into the IPEI Unrestricted Fund. Bill, or one of his associates, will give you further delivery instructions.

Please present these instructions to your broker and he or she should be able to transfer your gift to IPEI.

Thank you for your support of the Ithaca Public Education Initiative!