

## Stock Transfers



To make a broker-to-broker transfer, your broker will require the following written instructions:

|  |                                  |  |
|--|----------------------------------|--|
| <b>Foundation Broker:</b><br>Charles Schwab & Co., Inc.                          | <b>Participant DTC#:</b><br>0164 | <b>Foundation taxpayer ID#:</b><br>72-0840256      |
| <b>Receiving Account Name:</b><br>Catholic Foundation Archdiocese of New Orleans |                                  | <b>Receiving Brokerage Account #:</b><br>8766-3705 |

It is **extremely important** that you notify the Catholic Community Foundation when transferring securities into this account so that we may credit your gift to the appropriate fund/organization. Additionally, your name and address are required for tax deduction and acknowledgement purposes. Please complete the below information and send to Regina Templet by

**Email:** [rtemplet@ccfnola.org](mailto:rtemplet@ccfnola.org)

**Mail:** 1000 Howard Ave., Suite 800, New Orleans, LA 70113

**Fax:** 504-596-3068

|   |                         |               |            |
|---|-------------------------|---------------|------------|
| <b>Date of Transfer</b>   | <b>Donor Name</b>       |               |            |
| <b>Address</b>  | <b>City</b>             | <b>State</b>  | <b>Zip</b> |
| <b>Phone</b>  | <b>Email</b>            |               |            |
| <b>Name of Stock</b>  | <b>Number of Shares</b> | <b>Symbol</b> |            |
| <b>This stock gift is for the benefit of (parish, school, ministry, or nonprofit):</b>                            |                         |               |            |
| <b>This stock gift is designated for the following purpose (endowment, scholarship fund, unrestricted, etc.):</b> |                         |               |            |

The Catholic Community Foundation will mail you an acknowledgment letter for your tax purposes. Additional questions? Call Regina Templet at 504-527-5785.