

## Stock Transfers



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

<b>Foundation Broker:</b> Charles Schwab & Co., Inc.	<b>Participant DTC#:</b> 0164	<b>Foundation Taxpayer ID#:</b> 72-0840256
<b>Receiving Account Name:</b> Catholic Foundation Archdiocese of New Orleans		<b>Receiving Brokerage Account #:</b> 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:** 7887 Walmsley Ave., New Orleans, LA 70125

**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.