



INSTRUCTIONS FOR A CHARITABLE DONATION OF STOCK SHARES

Step 1: Complete Part I of the Charitable Stock Transfer Form.

A Stock transfer requires a letter of instruction signed by the current account owner(s) or a Charitable Transfer form provided by the account holder's Investment firm.

Step 2: Send a copy of the completed form to your investment advisor for processing.

Contact your Investment Advisor regarding their preferred method of receipt of this form.

It may take 1 -3 weeks for the shares to be transferred depending on your investment company.

Step 3: Send a copy of the completed form to The Catholic Foundation to ensure proper and timely recording of your donation.

Email: DBaird@TheCatholicFoundation.com

Fax : 303-468-9889.

If you have questions, please contact The Catholic Foundation at 303-468-9885 for assistance.

*Thank you for your contribution to The Catholic Foundation
May God bless you for your generosity.*

CHARITABLE STOCK TRANSFER FORM

Part I - Please complete the information below to notify your investment advisor of your request to transfer a gift of stock to The Catholic Foundation.

Donor Name: _____

Donor Address: _____

Donor Phone #: _____ Donor Email: _____

Investment Firm Name _____

Name of Stock/Mutual Fund to Donate

Ticker Symbol

Number of Shares to Donate

Approximate Dollar Value: \$

This donation is to The Catholic Foundation for the benefit of:

Beneficiary Name: _____ Amount: \$ _____ or %

Beneficiary Name: _____ Amount: \$ _____ or %

Beneficiary Name: _____ Amount: \$ _____

Part II – Delivery Investment Firm Account Information for The Catholic Foundation:

Charles Schwab
DTC# 0164
Account # 4516-5991
Account Name: The Catholic Foundation for the Roman Catholic Church in No Colorado
Code# 40
Phone #: 1-877-525-0588

Donor Signature: _____ **Date:** _____