



The Catholic Foundation Funds Stock Transfer Form/Instructions For Deposit to Charles Schwab

Please transfer the following stock in accordance with all requirements listed below
(use a separate form for each stock transferred):

Broker Name

Broker Phone #

Stock Name

Ticker Symbol

Number of Shares

Approximate Dollar Value: \$

Send stock instructions to: Charles Schwab
FAX #1-877-471-8478

Transfer Instructions:

DTC# 0164

Code# 40

Account # 4516-5991

Account Name: The Catholic Foundation for the Roman Catholic Church in Northern Colorado

For questions please contact: Stephanie Shellenberger at 1-877-525-0588

This donation is for: (complete one of the following):

Donor Advised Fund Name:

Parish, School or Org Fund Name:

General & Unrestricted Fund (Bridge Fund):

Donor Name:

Donor Address:

Donor Phone #:

Email:

Donor Signature:

Date:

Step I

Please complete the information above and send a copy of this document to your Investment Broker.

Step II

Please send a copy of this document to Darlene Espinoza at The Catholic Foundation via email: DEspinoza@TheCatholicFoundation.com or 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 Foundation and/or its beneficiaries. We appreciate your completing this form in full, so we may properly and quickly transact your contribution. May God bless you for your generosity.