

Step-by-Step Stock and/or Mutual Fund Gift Instructions

The following are step-by-step instructions for making a stock or mutual fund shares gift either to The Catholic Foundation of Southern Nebraska, or to a Catholic institution or organization served by The Catholic Foundation.

1. Complete the attached “Stock and/or Mutual Fund Shares Gift Information Form”
2. Inform The Catholic Foundation of the shares transfer (gift) in one of three ways:
 - a. E-mail the form to: claire-pohlen@catholicgift.org
 - b. Fax the form to: 531-500-3993
 - c. Mail the form to the following address:
The Catholic Foundation of Southern Nebraska
Attn: Claire Pohlen
3700 Sheridan Blvd, Suite 9
Lincoln, NE 68506-6100
3. Give the completed Stock and/or Mutual Fund Shares Gift Information Form to your financial services advisor. The form offers instructions and information needed to implement the transfer.
4. Ask the financial services advisor to contact Claire Pohlen at The Catholic Foundation of Southern Nebraska with any questions.

If you have questions regarding either mutual fund or stock gifts, please call Claire Pohlen at The Catholic Foundation of Southern Nebraska.

Claire Pohlen
Director Operations
The Catholic Foundation of Southern Nebraska
3700 Sheridan Blvd., Suite 9
Lincoln, NE 68506-6100
Phone: 402-488-2142
E-mail: claire-pohlen@catholicgift.org



The Catholic Foundation of Southern Nebraska
Attn: **Claire Pohlen, Director of Operations**
3700 Sheridan Blvd., Suite 9, Lincoln, NE 68506-6100
402-488-2142, Ext. 102
E-mail: claire-pohlen@catholicgift.org

Stock and/or Mutual Fund Shares Gift Information Form

DONATION INFORMATION

DATE: _____

Name of donor: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone number(s): _____

Name of the financial institution from which the shares (transfer) will be received: _____

Name of the financial advisor initiating the shares transfer: _____

Approximate (estimated) date of transfer: _____

This gift is *In memory of* or *In honor of* (if applicable, check one): _____

Donation and check to be made for the benefit of: _____ In the Amount or Percentage of: _____

Name of Stock and/or Mutual Fund:	Symbol:	Number of Shares Donated:
_____	_____	_____
_____	_____	_____
_____	_____	_____

Information needed for your shares Transfer Form (from your financial services firm) includes all, or some of, the following:

Name of Receiving Financial Institution: **TD Ameritrade**
TD Ameritrade Account receiving the gift: **The Catholic Foundation of Southern Nebraska**
Account Number for the account to receive transferred shares: **#869594664**
Electronic delivery through Depository Trust Company (DTC): **DTC ID #0188**

The Catholic Foundation of Southern Nebraska Tax ID #: 47-0825444

NOTE: In order for The Catholic Foundation to track transfers of stock or mutual fund shares, please scan and e-mail this completed form directly to Claire Pohlen, Director of Operations at The Catholic Foundation of Southern Nebraska: claire-pohlen@catholicgift.org | 402-488-2142 Ext. 102