

Step-by-Step Stock and/or Mutual Fund Shares 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: melanie-kottwitz@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: Melanie Kottwitz
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 Melanie Kottwitz at The Catholic Foundation of Southern Nebraska with any questions.

If you have questions regarding either stock or mutual fund gifts, please contact Melanie Kottwitz at The Catholic Foundation of Southern Nebraska via email at melanie-kottwitz@catholicgift.org or phone **402-488-2142 Ext. 102**



Catholic
FOUNDATION

OF SOUTHERN NEBRASKA

www.catholicgift.org

The Catholic Foundation of Southern Nebraska
Attn: Melanie Kottwitz, Executive Assistant
3700 Sheridan Blvd., Suite 9, Lincoln, NE 68506-6100
402-488-2142, Ext. 102
E-mail: melanie-kottwitz@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: **Charles Schwab & Company, Inc.**
- Charles Schwab Account receiving the gift: **Catholic Foundation of Southern Nebraska**
- Account Number for the account to receive transferred shares: **76969924**
- Electronic delivery through Depository Trust Company (DTC): **DTC ID #0164 Code 40**

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