



To carry on the work of Christ by fostering philanthropy

STOCK TRANSFER PROCEDURES

For more information on stock transfers, please call the Catholic Community Foundation at 602.354.2400

Electronic transfer of securities:

The simplest and easiest way to transfer securities is through electronic transfer from your broker or bank.

1. Complete and mail a copy of the notification of your intention to transfer securities to John A. Scola, CFRE, President, Catholic Community Foundation and to Parish, School or Organization for whom the gift is intended. It is necessary for all parties to be aware of an impending transfer.
2. Have your broker or banker notify Mike Sherman at Peacock, Hislop, Staley & Given, Inc., 602.952.6879.
3. The information necessary to transfer the securities is as follows:
DTC #0052
Catholic Community Foundation Tax ID #86-0465177
Account #1952-7609

Transfer of certificates by mail:

1. Complete and mail a copy of the notification letter to John A. Scola, CFRE, President, Catholic Community Foundation, 400 East Monroe Street, Phoenix, AZ 85004. Again, this information should be sent the Parish, School or Organization for whom the gift was intended.
2. Mail the stock certificates with a copy of the notification letter mentioned above by registered mail requesting a signature as proof of receipt.
3. DO NOT sign the stock certificates.
4. In a separate envelope, also by registered mail, send a signed Stock Power to transfer ownership to the Catholic Community Foundation.

For hand delivery of your gift or securities:

Please call Peacock, Hislop, Stanley & Given, Inc. at 602.952.6879 for assistance.

Confirmation Form:

A stock confirmation form is sent to the Catholic Community Foundation from our broker. The stock confirmation form will verify the value of the shares of stock delivered, the price at the time of sale, and the final value of the gift for tax purposes. The Foundation forwards this confirmation to the Parish or Organization for whom the gift was intended. Again, this will serve as verification and receipt for the securities transfer. The Parish or Organization will, from this document, confirm your contribution/donation.

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STOCK TRANSFER LETTER OF INTENTION
Please use this form to accompany any deposits and mail to:
Catholic Community Foundation
400 E. Monroe Street • Phoenix, AZ 85004

Catholic Community Foundation
400 E. Monroe Street
Phoenix, AZ 85004

Attn: John A. Scola, CFRE, President

Dear Mr. Scola:

Please accept our donation of _____ shares of _____
(# of shares) (Name of security)

to be credited to the following:

Catholic Community Foundation for Benefit of

(Parish, School or Organization)

(Street Address)

(City, State, Zip)

(Endowment Fund, Personal Family or Field of Interest Fund)

(Contact: Parish, School or Organization)

Thank you.

Donor Signature

Donor Signature

Date

Date

Please Print

Name _____

Address _____

City _____ State _____ Zip _____

Phone _____

This form must be completed for all stock transfers.
If you need further assistance, please call (602) 354.2400 or email jscola@ccfphx.org.