Revised 4/15/2021

CATHOLIC COMMUNITY
FOUNDATION

Enriching Lives In Northeast Ohio

INSTRUCTIONS FOR TRANSFER OF STOCK FROM A DONOR'S BROKERAGE ACCOUNT DIRECTLY TO CCF'S BROKERAGE ACCOUNT

If a donor wishes to transfer shares from a personal brokerage account to the account of the **Catholic Community Foundation**, the donor must convey the following information to their broker:

Receiving Broker:	Morgan Stanley	
Account Name:	Catholic Community Foundation	
Account Number:	613-120296-017	
DTC Routing Number:	0015	
Morgan Stanley Contacts:	Cheryl Hartman	Cheryl.L.Hartman@morganstanley.com (717) 519-4948
	Gregory Luscher	Gregory.Luscher@morganstanley.com (717) 519-4945

To ensure prompt processing and acknowledgement of your gift, please call or email

Madelyn Zone
216-696-6525 x2940
mzone@catholiccommunity.org

And provide the following information:

- ***Name of person or organization donating the stock***
- ***Name of Stock***
- ***Number of Shares***
- ***Gift Designation/Purpose, or to Where proceeds should be forwarded***

Per IRS rules, the value of the gift will be determined upon the date the stock is transferred into the Catholic Community Foundation's account.

INSTRUCTIONS FOR TRANSFER OF A STOCK CERTIFICATE HELD IN A DONOR'S NAME

To donate a stock certificate held in your own name, a Stock Power Form and a Security Release Form will be sent for your notarized signature to complete the gift transfer.

Per IRS rules, the value of the gift will be determined as of the notarization date of all properly executed forms.