



Stock Transfer Procedures

**For more information on stock transfers, please call
the Catholic Community Foundation at
480.651.8800**

Thank you very much for your interest in donating to the Catholic Community Foundation. Please follow the steps outlined.

1. Complete and mail the Stock Donation Letter of Intention

To begin, please complete the Stock Donation Letter of Intention. Mail or fax one copy to the attention of: **Kyle Felix, Chief Financial Officer** and, if applicable, to the Parish, School or Organization for whom the gift is intended. It is necessary for all parties to be aware of an impending transfer.

If you are transferring mutual fund shares, please fill out the following information:

Mutual Fund Name: _____

Mutual Fund Type (i.e. Single, Joint, Corporate, etc.): _____

Cusip #: _____ Ticker Symbol: _____ Number of Shares: _____

Donor Name: _____ Brokerage Account #: _____

Brokerage Firm Name: _____

Brokerage Firm Address: _____

Broker Contact Name and Phone Number: _____

Is this a Full Account Transfer In-Kind or Partial Transfer In-Kind? _____

2. Transfer the stock

Transfer stock: electronically (the simplest and fastest way), by registered US mail, or in person.

a. To electronically transfer securities:

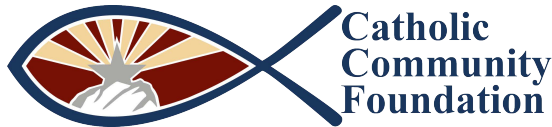
1. Your bank or broker must notify: **Deb Kearney at Morgan Stanley (515)-224-5518**, or deb.kearney@msgraystone.com.
2. Provide your bank or broker the following information necessary to transfer the securities:
 - **Morgan Stanley, DTC 0015**
 - **Catholic Community Foundation for the Diocese of Phoenix, 394-011942**
 - **Catholic Community Foundation for the Diocese of Phoenix Tax ID, 86-0465177**

Note: If you are transferring stock to establish an annuity, you will need to provide the Catholic Community Foundation with a statement that provides the cost basis for the stocks transferred.

3. Receive confirmation from the recipient

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 the 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

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Thank you very much for your interest in donating to the Catholic Community Foundation for the Diocese of Phoenix.

To begin, please complete this Stock Transfer Letter of Intention. Mail, fax or email one copy to the attention of:
Kyle Felix, Chief Financial Officer.

Please complete this form for all stock donations.

Date _____

From (please print):

Donor name(s): _____

Address: _____

City, State, Zip: _____

Telephone: _____

To:

Kyle Felix
Chief Financial Officer
Catholic Community Foundation
4500 S. Lakeshore Drive, Suite 650
Tempe, AZ 85282
Fax: 480.651.8813
kfelix@ccfphx.org

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

To be credited to the Catholic Community Foundation for the benefit of:

Fund/Organization Name _____

Address _____

City, State, Zip _____

Donor signature _____

Date _____

Donor signature _____

Date _____

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