



CATHOLIC COMMUNITY  
FOUNDATION

*Enriching Lives In Northeast Ohio*

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

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

Broker:	Morgan Stanley	
Account Name:	Catholic Community Foundation – Heart of a Shepherd	
Account Number:	613-052441-017	
DTC Routing #:	0015	
Contacts:	Cheryl Hartman	<a href="mailto:Cheryl.L.Hartman@morganstanley.com">Cheryl.L.Hartman@morganstanley.com</a> (717) 519-4948
	Gregory Luscher	<a href="mailto:Gregory.Luscher@morganstanley.com">Gregory.Luscher@morganstanley.com</a> (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](mailto:mzone@catholiccommunity.org)***

***And provide the following information:***

- *Name of person or organization donating the stock*
- *Name of Stock*
- *Number of Shares*

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.