



HEART OF A SHEPHERD

Building for Today. Providing for Tomorrow.

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	Cheryl.L.Hartman@morganstanley.com (717) 519-4948
	Gregory Luscher	Gregory.Luscher@morganstanley.com (717) 519-4945

Please call or e-mail Justin Turk at (216) 696-6525, Ext. 1142 (jturk@dioceseofcleveland.org) with your name, address, name of stock, and number of shares to ensure accurate, prompt processing and acknowledgement of your gift.

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.

CAMPAIGN OFFICE | 1404 East Ninth Street | Cleveland, OH 44114-1722
216-902-1300 | 1-800-869-6525 | www.CatholicCommunity.org