



Stock Transfer Procedures

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

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: **Rick Frisch, President and CEO of the 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. Transfer the stock

Three ways to 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: **Client Service Team at J.P. Morgan, (877)576-2524**, of the electronic transfer.
2. Provide your bank or broker the following information necessary to transfer the securities:
 - **JP Morgan, DTC # 0902**
 - **Catholic Community Foundation Tax ID # 86-0465177**
 - **Catholic Community Foundation Account # B15194008**

b. To transfer the certificates via registered US mail:

1. **DO NOT SIGN** the stock certificates.
2. By registered mail, enclose the *stock certificates* with the *Letter of Intention*, addressed to: **Rick Frisch, President and CEO of the Catholic Community Foundation, 400 E. Monroe Street, Phoenix, AZ 85004**. Request a signature as proof of receipt.
3. **In a separate envelope**, also by registered mail and requesting proof of receipt, send a signed *Irrevocable Stock or Bond Power* form to: **Rick Frisch, President and CEO of the Catholic Community Foundation, 400 E. Monroe Street, Phoenix, AZ 85004**, to transfer ownership to the Foundation. This form must be signed and dated. If you wish, you may enter Parish and Foundation name in the upper left portion of the form, number of shares, and stock name. Do not enter the Account Number or your Social Security number.

c. To hand deliver the securities:

1. **DO NOT SIGN** the stock certificates.
2. Call the Catholic Community Foundation at 602-354-2400 to set an appointment time to deliver the *Letter of Intention*, the *stock certificates*, and a signed *Irrevocable Stock or Bond Power* forms to our office.

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: **Rick Frisch, President and CEO.**

Please complete this form for all stock donations.

Date _____

From (please print):

Donor name(s): _____

Address: _____

City, State, Zip: _____

Telephone: _____

To:

Rick Frisch
President and CEO
Catholic Community Foundation
400 E Monroe Street
Phoenix, AZ 85004
Fax: 602.354.2423
info@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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