

CHARITABLE STOCK DONATIONS

Step 1 - Donor: Complete the following information for your broker:

Donor Name:

Donor Address:

Donor Phone #:

Donor Email:

Broker Name

Broker Phone #

Stock Name

Ticker Symbol

Number of Shares

Approximate Dollar Value: \$

This donation is to The Catholic Foundation for the benefit of:

Beneficiary Name:

Amount: \$

or %

Beneficiary Name:

Amount: \$

or %

Beneficiary Name:

Amount: \$

or %

Donor Signature:

Date:

Step 2 - Brokers: Delivery Investment Firm for Charitable Donation:

Fax # 1-877-471-8478

Phone #: 1-877-525-0588

Charles Schwab

DTC# 0164

Code# 40

Account # 4516-5991

Account Name: The Catholic Foundation for the Roman Catholic Church in Northern Colorado

Step 3 – Donors: Notify The Catholic Foundation of your Charitable Donation

In order for The Catholic Foundation to properly apply your gift in a timely manner, please send a copy of this document to Darlene Espinoza at The Catholic Foundation via email: DEspinoza@TheCatholicFoundation.com or fax: 303-468-9889. If you have questions, please contact The Catholic Foundation at 303-468-9885 for assistance.

Thank you for your contribution to the Foundation and/or its beneficiaries. May God bless you for your generosity.