Stock Transfers

To make a broker-to-broker transfer, your broker will require the following written instructions:

Foundation Broker: Charles Schwab & Co., Inc.	**Participant DTC#:** 0164	**Foundation Taxpayer ID#:** 72-0840256
Receiving Account Name: Catholic Foundation Archdiocese of New Orleans		**Receiving Brokerage Account #:** 8766-3705

It is **extremely important** that you notify the Catholic Community Foundation when transferring securities into this account so that we may credit your gift to the appropriate fund/organization. Additionally, your name and address are required for tax deduction and acknowledgement purposes. There may be a small administrative fee applied. Please complete the below information and send to Regina Templet via:

Email: rtemplet@ccfnola.org **Mail:** 7887 Walmsley Ave., New Orleans, LA 70125
Fax: 504-596-3068

Date of Transfer	**Donor Name**		
Address	**City**	**State**	**Zip**
Phone	**Email**		
Name of Stock	**Number of Shares**	**Symbol**	
This stock gift is for the benefit of (parish, school, ministry, or nonprofit): Echo Community - federal tax ID# is 20-4729973			
This stock gift is designated for the following purpose (endowment, scholarship fund, unrestricted, etc.):			

The Catholic Community Foundation will mail you an acknowledgment letter for your tax purposes. Additional questions? Call Regina Templet at 504-527-5785.