



STOCK TRANSFER FORM

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

Foundation Broker: Morgan Stanley	DTC Participant #: 0015	The Curtis Group at Graystone Consulting 1400 Page Mill Rd Palo Alto, CA 94304 (650) 496-4260 www.morganstanleygc.com/curtisgroup
	Foundation Account #: 662-046923-051	
	Foundation taxpayer ID#: 83-0400149	Account Manager: Thomas McCue

Once the stock is transferred:
Please send written instructions to the Foundation
(you may fill out and send in the following by fax, letter or email)

Date of Transfer _____ Donor Name(s) _____

Address _____ City _____ State ____ Zip _____

Phone _____ Email _____

Name of Stock _____ Number of Shares _____ Symbol _____

Any Stock Restrictions? _____

Pledge Payment (Yes/No) _____

This stock gift is for the benefit of

Contact Information

Catholic Community Foundation of Santa Clara County
777 North First Street, Suite 490
San Jose, CA 95112
Phone (408) 995-5219 FAX (408) 995-5865
email info@cfoscc.org

A letter of acknowledgement will be sent by the Catholic Community Foundation

For further information about donation of stock, cash, securities or other assets, contact the following:

Sean Finigan
(408) 995-5219
email: finigan@cfoscc.org

Form: ST009 09182017