

Stock Transfers to The Catholic Foundation of Santa Clara County

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

Foundation Broker: Enterprise Trust & Investment Co.	Account Manager: Troy Jones	Enterprise Trust: 15425 Los Gatos Blvd. Suite 150 Los Gatos, CA 95032 408.358.5811 www.enterprise-trust.com
Foundation DTC Participant #: 901	DTC Internal Account #: 108233	
		Foundation taxpayer ID#: 83-0400149

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 _____

Address _____ City _____ State ____ Zip _____

Phone _____

Name of Stock _____ Number of Shares _____ Symbol _____

Any Stock Restrictions? _____

Pledge Payment (Yes/No) _____

This stock gift is for the benefit of (Parish Name, Case Element or Where Needed Most)

Contact Information

Catholic Foundation of Santa Clara County
777 North First Street, Suite 490
San Jose, CA 95112-6337
Phone (408) 995.5219 FAX (408) 995-5865
email info@cfoscc.org

A letter of acknowledgement will be sent by the Catholic Foundation

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

Peggy Bradley
Catholic Foundation of Santa Clara County
777 North First Street, Suite 490
San Jose, CA 95112-6337
(408) 995.5219
email: bradley@cfoscc.org

Form: ST003 042709