



*The Society of St. Vincent de Paul
of Contra Costa County*

2210 Gladstone Drive, Pittsburg, CA 94565
Phone: 925-439-5060 Fax: 925-439-7863 www.svdp-cc.org

TRANSFER INSTRUCTIONS FOR STOCK and/or MUTUAL FUND SHARES DONATION

Dear Donor or Donor Advisee,

Thank you for donation of stock or mutual fund shares. To facilitate the donation, please take the following steps:

1. Please complete the letter of authorization attached below. FAX this letter to both your broker's transfer department, and to St. Vincent de Paul of Contra Costa County (Fax #: 925-439-7868)
2. Please provide your broker with the following transfer information. Note, your broker must initiate the transfer:

TRANSFER SHARES TO:

Charles Schwab & Co.

Account Name: SOCIETY OF ST VINCENT DE PAUL OF CONTRA COSTA COUNTY

Depository Trust Company (DTC) Number: 0164, code 40

Charles Schwab **Account Number: 8401-1805**

3. Instruct your broker to include your name (the Donor) on the trailer or second line of the transfer instructions.

Thank you again for your donation. Should you have any questions, please contact your broker directly.

or

Society of St. Vincent de Paul of Contra Costa County, **Tax ID: 94-1448577**
2210 Gladstone Drive, Pittsburg, CA 94565
Accounting Manager, Phone: 925-439-5060 ext. 18
accounting@svdp-cc.org

LETTER OF AUTHORIZATION

Date:

To: Donor's Transfer Department
Donor's Broker name
Broker Fax number

CC: Accounting Manager
Society of St. Vincent de Paul of Contra Costa County, **TAX ID: 94-1448577**
2210 Gladstone Drive, Pittsburg, CA 94565
FAX: 925-439-7868

Re: Donation of securities to Society of St Vincent de Paul of Contra Costa County

Please accept this as your authorization to DTC _____ shares of
Name/Symbol _____ into Charles Schwab **account no. 8401-1805**, for the Society of
St Vincent de Paul of Contra Costa County. DTC Number: 0164 Code: 40

Sincerely,

Customer Signature

Joint Customer Signature

Phone Number:

Instructions for Donor: **Please FAX TO Your broker's transfer department**

and fax to:

CC: Accounting Manager
Society of St. Vincent de Paul of Contra Costa County
FAX: 925-439-7868

If clients would like to send cash, they can use the following wire instructions (wire fee associated):

Citibank, NA
111 Wall St, New York, NY 10005
ABA#:021000089
FBO: Charles Schwab & Co., Inc.
A/C #: 40553953
For further credit to Schwab Client A/C #: _____