



**Catholic Charities**  
*of the Diocese of Santa Rosa*

**Electronic Transfer of Securities Form**

Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Address:  
 \_\_\_\_\_

Email:  
 \_\_\_\_\_

The date I requested the transfer of securities: \_\_\_\_\_

Name of Brokerage Firm: \_\_\_\_\_

Phone Number of Brokerage Firm: \_\_\_\_\_

Donated stock should be sent by donor's stock brokerage to:  
 Charles Schwab  
 DTC Clearing Number 0164  
 Account number 4631-6646  
 For the benefit of Catholic Charities of the Diocese of Santa Rosa

| Corporate Name of Gifted Securities | CUSIP # | Number of Shares |
|-------------------------------------|---------|------------------|
| _____                               | _____   | _____            |
| _____                               | _____   | _____            |
| _____                               | _____   | _____            |

Please use my gift for: (Select one)  
 Area of Greatest Need  
 Specific Program (*please specify*) \_\_\_\_\_

Please return this form to Catholic Charities Advancement office

Email: [mpettibone@srcharities.org](mailto:mpettibone@srcharities.org)  
 Fax: (707) 843-3538  
 Mail: Catholic Charities of the Diocese of Santa Rosa  
 PO Box 4900  
 Santa Rosa, CA 95402

*Please call Margie Pettibone at (707) 528-8712 x 161 with any questions.  
 Thank you for your generous support and assistance.  
 Catholic Charities' Federal Tax ID is 94-2479393.*