

Catholic Education

A R I Z O N A

CHANGING LIVES DIVISION

Changing Lives Division Stock and Mutual Fund Gift Transfer Process March 1, 2023

Thank you for supporting education scholarships with your gift of bonds, publicly traded stock and/or mutual fund shares. This document outlines the simple three step process to complete this transaction.

Step 1

The Charitable Gift Transfer Letter of Authorization

Please complete this Charitable Gift Transfer Letter of Authorization.

This gift is for:

- Endowment (Invested for the permanent creation of scholarships)
- Education Growth Fund (Provide scholarships within two years)

If you are transferring stock/mutual fund shares, please fill out the following:

Stock/Bond/Mutual Fund Name: _____

Brokerage Account #: _____ Number of Shares: _____

Symbol/CUSIP: _____

Donor Name(s): _____

Brokerage Firm Name: _____

Brokerage Firm Address: _____

Broker Contact Name and Phone Number: _____

Mail, fax, or email this page to

Jim Pogge
Catholic Education Arizona
5353 N 16th St #330
Phoenix, AZ 85016
Fax: (602) 218-6623
jpogge@ceaz.org

For more information on stock transfers and other types of gifts, e.g., IRA's, business interests, etc., please call or email Jim Pogge at Catholic Education Arizona at (602) 218-6542 or jpogge@ceaz.org.

Catholic Education Arizona is a 501(c)(3) non-profit organization, Tax ID# 86-0937587. This letter serves as the record of receipt of your donation. In accordance with IRS guidelines, please note that Catholic Education Arizona has provided no goods or services in exchange for this contribution. Your donation may be tax deductible to the extent allowed by law. Please consult with your tax preparer for advice specific to your situation.

Catholic Education

A R I Z O N A

CHANGING LIVES DIVISION

Step 2

Transfer the Stock

Transfer stock: electronically (simplest and fastest way), by registered mail, or in person

- a. To electronically transfer securities
 1. Your bank or broker must notify: Gabby Rojas at Capital Insight Partners, (480) 597-7107 or gabby@cipinvest.com or Jim Pogge at Catholic Education Arizona, (602) 218-6542 or jpogge@ceaz.org
 2. Provide your bank or broker the following information necessary to transfer the securities:
 - Charles Schwab & Co., Inc., DTC #0164
 - Catholic Education Arizona Endowment Account (9045-1567)
 - Catholic Education Arizona Education Growth Fund Account (9760-6220)
 - Tax ID #: 86-0937587
- b. By registered mail or in person, use this address:

Jim Pogge
Catholic Education Arizona
5353 N 16th St #330
Phoenix, AZ 85016

Step 3

Donation Receipt

Catholic Education Arizona will send to you a confirmation letter for your gift. This letter will verify the value of the gift for tax purposes.

Your gift may offer tax advantages to you. The confirmation letter that you will receive will serve as an IRS compliant receipt that can be used when preparing your tax filings. Please consult with your tax advisor for specific advice.

Catholic Education Arizona is a 501(c)(3) non-profit organization, Tax ID# 86-0937587. This letter serves as the record of receipt of your donation. In accordance with IRS guidelines, please note that Catholic Education Arizona has provided no goods or services in exchange for this contribution. Your donation may be tax deductible to the extent allowed by law. Please consult with your tax preparer for advice specific to your situation.