

Stock Transfer

Electronic Transfer of Securities:

The simplest and easiest way to transfer securities is through electronic transfer from your broker or bank.

1. Complete and mail a copy of the notification of your intention to transfer securities to Karen Szymanski, Fund Officer, Diocese of Toledo Catholic Foundation and copy to the organization (School or Parish) for whom the gift is intended. It is necessary for both parties to be aware of an impending transfer.
2. Have your broker or banker notify Alyce Juby 419- 259-6197 or Randy Kilbourn 419-259-8218 at KeyBank prior to any transfer.
3. The information necessary to transfer the securities is as follows:

DTC: #2205

Tax ID: # 34-4428233

Account: # 20-10-211-0735407

Account Name: Stock Gift Account

Transfer of certificates by mail:

1. Complete and mail a copy of the notification *Letter of Intention* to Karen Szymanski, Catholic Foundation, 1933 Spielbusch Ave. Toledo, OH 43604. This information should also be sent to the Organization (School or Parish) for whom the gift is intended.
2. Mail the stock certificate with the notification letter mentioned above by registered mail with a signature as proof of receipt.
3. **DO NOT** Sign the stock certificates. Never send “Irrevocable Stock or Bond Power,” **and** stock certificate in same envelope. This is for your protection as together they issue the finder of envelope full rights to sell stock as their own.
4. In a separate envelope, also by registered mail, send a signed *Letter of Intention* to transfer ownership to the Diocese. (only applies if you don’t have stock certificates)

For Hand Delivery of your gift of Securities: Please call Alyce Juby 419-259-6197 or Randy Kilbourn 419-259-8218 at KeyBank.

Confirmation Form:

A sale confirmation is sent to the Catholic Foundation by **KeyBank**. The sales confirmation form will verify the value of the shares of stock/bond delivered (sold), the price at the time of sale, and the final value of the gift for tax purposes. The Foundation forwards this confirmation form to the organization (school or parish) for whom the gift is intended. Again, this will serve as verification and receipt for the securities transfer. A confirmation letter will be sent for tax purposes from the recipient organization and to confirm your stock/donation.

Call Karen Szymanski, Catholic Foundation if there are additional questions, 419-244-6711 (X152).