



Instructions for Transferring Securities to the Catholic Foundation of North Georgia

Please contact the Catholic Foundation to provide the number of shares and the names of securities you are transferring to the Foundation. Brokers and banks do not always provide the Foundation with the names of donors and their intentions. Please also provide the intended beneficiary of your gift (the fund you wish the securities to benefit). This will help us issue your tax letter correctly and ensure your gift is directed to your intended beneficiary.

Please share the following information with your financial advisor:

Legal Name: The Catholic Foundation of North Georgia

Tax I.D. 58-2008930

Address: 5871 Glenridge Drive NE

Suite 300

Atlanta, GA 30328

- Name of Stock and Stock Symbol
- Number of shares you want to transfer
- Name of Endowment Fund at the Catholic Foundation to which the proceeds will be applied – i.e., **St. Joseph School Marietta Endowment Fund**

Raymond James & Associates

DTC Number 0725

Account number: 27230757

The same above information is needed when you are transferring shares from a mutual fund.

If you have any questions, please contact Juliet Greco, Director of Major and Planned Giving, 404-497-9440 or jgreco@cfnga.org.