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Donating Gifts of Securities

The Board of Trustees and Staff of the Independent Catholic Foundation are grateful to you for your interest in donating securities either directly to the Foundation or as a pass-through for the benefit of other Catholic causes. In all instances, it is advisable to consult with your financial advisor and/or tax consultant to determine your specific charitable gift benefits. He or she will need the information on this document to complete the transfer of securities.

Prior to the transfer of securities, please communicate your intention to one of the Foundation Contacts shown below (the stock name/symbol, number of shares to be donated, any gift restrictions and whether the gift is being made anonymously).

To donate mutual fund shares, please contact your mutual fund company for instructions on transferring shares in the name of the Independent Catholic Foundation.

Account Name: Independent Catholic Foundation
Account Number: 3302-4326
DTC Number: 0793 / Stifel
Federal Tax ID Number: 25-1625390

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The Independent Catholic Foundation will issue a charitable gift receipt to the donor for income tax purposes after receiving confirmation of the securities transfer. Thank you!