

# How to Transfer Stocks, Bonds and Mutual Funds

## Donations of DTC Eligible Stocks and Bonds

The fastest and easiest way to make a stock gift to the Passionists is to do an electronic transfer. Your broker will need the following information:

<b>Broker:</b>	Charles Schwab and Company, Inc.
<b>DTC Clearing:</b>	0164, Code 40
<b>For Deposit To:</b>	The Congregation of the Passion, Holy Cross Province
<b>Account Number:</b>	4422-0451
<b>Registration Type:</b>	Charity Non-Profit

Typically, securities submitted to DTC for transfer are delivered within 7 business days.

## Donations of Mutual Funds

If marketable shares of mutual funds are in the custody of your financial institution and you wish to transfer them to The Passionists, follow these instructions:

<b>Broker:</b>	Charles Schwab and Company, Inc.
<b>Address:</b>	Attn: Mutual Funds 101 Montgomery Street San Francisco, CA 94104
<b>For Deposit To:</b>	The Congregation of the Passion, Holy Cross Province
<b>Account Number:</b>	4422-0451
<b>Registration Type:</b>	Charity Non-Profit

Typically, securities submitted for transfer are delivered within 7 – 10 business days.

Contact us with the following information so we can thank you for your gift!

- Your name.
- Your phone number.
- Name of the securities being gifted.
- Number of securities being gifted.
- Your broker's name and contact information.
- Any restrictions that you are placing on your gift.

Please contact Robin Heart, Donor Relations Associate. Robin can be reached at [rheart@passionist.org](mailto:rheart@passionist.org) or at 800.295.9048, extension 2210. We are so grateful for your gift.

*May the Passion of Jesus Christ be Always in our Hearts!*