



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 ID: 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 the 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 information is needed when you are transferring shares from a mutual fund.

If you have any questions, please contact Juliet Greco, Vice President, Development and Donor Relations, at 404.497.9440 or jgreco@cfnga.org.