



Catholic Community
FOUNDATION

Security Transfer Instructions

All gifts of appreciated securities (stocks, mutual fund shares, bonds, or ETFs) are now received through the Catholic Community Foundation of Minnesota and should be directed as follows:

DTC-ELIGIBLE SECURITY OR ACAT-ELIGIBLE* MUTUAL FUND TRANSFER

(Securities you own with an advisor or at a brokerage company)

Instruct your financial advisor to deliver to:

Custodian: Charles Schwab & Co.

DTC: 0164

Account Name: Catholic Community Foundation of MN

Account: 4863-9694

fbo: St. Jude of the Lake Catholic Church & School

*ACAT-eligible mutual fund shares are generally held in a brokerage account and not directly by the mutual fund company. Please contact CCF directly at 651-389-0300 to determine if your mutual fund is eligible for transfer.

**Please contact Cathy Hilby at the parish office to inform us of your gift prior to the transfer:
651-426-3245 or chilby@stjudeofthelake.org**