



The Society of St. Vincent de Paul
of Contra Costa County

2210 Gladstone Drive, Pittsburg, CA 94565
Phone: 925-439-5060 Fax: 925-439-7863 www.svdpc-cc.org

TRANSFER INSTRUCTIONS FOR STOCK and/or MUTUAL FUND SHARES DONATION

Dear Donor or Donor Advisee,

Thank you for donation of stock or mutual fund shares. To facilitate the donation, please take the following steps:

1. Please complete the letter of authorization attached below. FAX this letter to both Stacey Chretien, Vice President – Sr. Financial Consultant at Charles Schwab & Co., and to St. Vincent de Paul of Contra Costa County (fax information provided below).
2. Please provide your broker with the following transfer information. Note, your broker must initiate the transfer:

TRANSFER SHARES TO:

Charles Schwab & Co.
ATTENTION: Stacey Chretien
1231 South California Blvd.
Walnut Creek, CA 94596

Account Name: **SOCIETY OF ST VINCENT DE PAUL OF CONTRA COSTA COUNTY**

Depository Trust Company (DTC) Number: 0164, code 40

Charles Schwab Account Number: 8401-1805

3. Instruct your broker to include your name (the Donor) on the trailer or second line of the transfer instructions.

Thank you again for your donation. Should you have any questions, please contact:

Stacey Chretien, Charles Schwab & Co
1231 South California Blvd, Walnut Creek, CA 94596
Phone: 925-974-2901
stacey.chretien@schwab.com

or

Society of St. Vincent de Paul of Contra Costa County
2210 Gladstone Drive, Pittsburg, CA 94565
Phone: 925-439-5060 ext. 18
accounting@svdp-cc.org

LETTER OF AUTHORIZATION

Date:

Stacey Chretien, CFP
Vice President – Sr. Financial Consultant
Charles Schwab & Co.
1231 S. California Blvd, Walnut Creek, Ca. 94596
FAX: 925-974-2929

CC: Accounting Manager
Society of St. Vincent de Paul of Contra Costa County
2210 Gladstone Drive, Pittsburg, CA 94565
FAX: 925-439-7868

Re: Donation of securities to Society of St Vincent de Paul of Contra Costa County

Dear Ms. Chretien:

Please accept this as your authorization to deposit _____ shares of _____
stock into account no. 8401-1805, for the Society of St Vincent de Paul of Contra Costa County.

Sincerely,

Customer Signature

Joint Customer Signature

Phone Number:

FAX TO:

ATTENTION:
Stacey Chretien, CFP
Vice President – Sr. Financial Consultant
Charles Schwab & Co.
FAX: 925-974-2929

and

CC: Accounting Manager
Society of St. Vincent de Paul of Contra Costa County
FAX: 925-439-7868