



# Stock Donation Form

**Consult your tax advisor and your stock broker or brokerage account customer service representative and get the facts on donating appreciated common stock before you make a final decision.**

1. If you have an account with Charles Schwab, simply call a Schwab customer service representative and tell them you wish to transfer shares to:

Whispering Winds Catholic Conference Center, Inc., account 9352-5615.

If you have an account with another brokerage firm, contact your broker or customer service representative and tell them you wish to transfer shares to:

Whispering Winds Catholic Conference Center, Inc.  
c/o Charles Schwab & Co, account 9352-5615  
DTC number 0164, code 40.

2. Retain a copy of the broker confirmation for tax purposes.
3. Please complete the form below and submit it to: Business Manager, c/o Whispering Winds Catholic Conference Center, Inc. via Fax: 619-464-4491, email: office@whisperingwinds.org or mail: 8186 Commercial St., La Mesa, 91942. A confirmation letter will be sent to you confirming the receipt of your shares.

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**FROM:**

Donor's Name: \_\_\_\_\_

Donor's Address: \_\_\_\_\_

City: \_\_\_\_\_ St: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ FAX: \_\_\_\_\_

Name of Security: \_\_\_\_\_ # of Shares: \_\_\_\_\_

Date of transfer: \_\_\_\_\_

Brokerage Company Name: \_\_\_\_\_

Stockbroker's Name, if applicable: \_\_\_\_\_ Phone: \_\_\_\_\_

We sincerely appreciate your generosity!  
Whispering Winds Catholic Conference Center, Inc.