



## Stock Donation Form

Donating appreciated common stock to Whispering Winds is a fairly simple process that can greatly benefit Whispering Winds and provide you, the donor, with worthwhile income tax benefits compared to a cash donation.

**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.**

Whispering Winds has an account with Charles Schwab & Co so the process is fairly simple.

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.

Retain a copy of the broker confirmation for tax purposes.

Complete the form below and fax to Business Manager, c/o Whispering Winds Catholic Conference Center, Inc 619-464-4491. 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.