



**Saint Joseph Notre Dame High School
Donation of Stock or Mutual Funds**

Thank you for supporting Saint Joseph Notre Dame High School with your donation of stock or mutual funds. The following information will assist you and your broker in completing the electronic transfer of stock or mutual funds to SJND.

SJND holds an account with Charles Schwab & Co. Inc. Our contact is Liz Mitchell with Beacon Pointe Advisors. **Liz may be reached at (949) 718-1626, LMitchell@beaconpointe.com.**

Please provide your broker with the following delivery instructions:

Delivery of Stocks to Charles Schwab

DTC # 0164, Code 40
Schwab Account #: 8088-1149
Schwab Account Name: Saint Joseph Notre Dame High School Account
Schwab Contact: Schwab Institutional Transfer Department
Attn: (602) 355-9003 (Option 6)
Schwab Address: P.O. Box 52013, Phoenix, AZ 85072

Delivery of Mutual Funds to Charles Schwab

A representative from the Mutual Fund Company or bank should call Schwab’s transfer department (602) 355-9003 (Option 6) to get a house account number.

- SJND is a not for profit qualified under section 501(c) 3 of the Internal Revenue Code. Saint Joseph Notre Dame High School’s tax identification number (FEIN) is 87-0713302.
- Please contact Mollie McFarland, Assistant Principal of Institutional Advancement at (510) 995-9456 with any questions.

Also, please fill in the information below and fax, email or mail it to SJND. This information will be used to help us acknowledge the donor with a donation receipt.

Donor’s Name _____

Donor’s Address _____

Donor’s Phone Number _____

Name and Type of Stock _____ Number of Shares _____

Date of Transfer _____

Broker’s Name and Phone Number _____

Please fax, email or mail this form to:
Mollie McFarland, Assistant Principal of Institutional Advancement
Saint Joseph Notre Dame High School
1011 Chestnut St
Alameda, CA 94501
Fax: 510-814-7118. Email: mmcfarland@sjnd.org