

**Transferring Stock Shares To:**

**The Episcopal Diocese of San Diego**

2083 Sunset Cliffs Blvd., San Diego, CA 92107

Phone: 619-291-5947      Fax:

**DTC routing number:**      0164, Code 40 (Charles Schwab)

**To account number:**      2060-5396

**Federal Tax ID Number:**      95-2861286

Please transfer \_\_\_\_\_ shares of \_\_\_\_\_ to the benefit of The Episcopal Diocese of San Diego's account with Charles Schwab (DTC routing 0164) to the credit of account number 2060-5396.

**Purpose of gift:**      The Diocesan Fund

Thank you,

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Signature Guarantee

\_\_\_\_\_  
Date

Please send or fax a copy of this letter to the Episcopal Diocese of San Diego development office after delivering the transfer.

## **Transfer Shares Electronically**

**It is very important** to contact us at [jevans@edsd.org](mailto:jevans@edsd.org) when the transfer has been completed or call us at (619) 481-5451.

*We will need to know the number of shares, the name of the security, the purpose of the gift, and your name and address. We need this information to properly acknowledge your gift because an electronic transfer of shares does not include a notification of who the shares are from.*

Instruct your broker to transfer your shares from your account to The Episcopal Diocese of San Diego.

### **Sample Transfer Instruction Letter:**

**Brokerage Firm:** Charles Schwab  
**Account Number:** 2060-5396  
**DTC Number:** 0164, Code 40  
**Name on Account:** The Episcopal Diocese of San Diego

### **Giving a Certificate:**

1. You may deliver your stock certificate to your broker to have a new certificate issued in the name of The Episcopal Diocese of San Diego. Our tax identification number is 95-2861286. This certificate can then be mailed to us without endorsement.
2. You may endorse a stock certificate to The Episcopal Diocese of San Diego by printing and completing the Stock Power Form and the Security Waiver Form.
3. Mail the paperwork to:

**The Episcopal Diocese of San Diego  
Attn: Development Office  
2083 Sunset Cliffs Blvd.  
San Diego, CA 92107**

More information can be found at <https://edsd.org/give>.