Stock Transfer Instructions

Direct your broker to make an electronic transfer of shares to the Holy Family Ministries account (receiving firm is Schwab). Most brokerage firms have their own forms to complete.

If your brokerage firm does not have a form to complete, use this sample language with your broker:

"I wish to make an irrevocable gift to Holy Family Ministries of "XX" shares of "Name of Stock, Ticker: XXXX."

Transfer the stock via DTC as follows:

Captrust Brokerage - Attn. Brian Thrasher and Matt Winton
FBO Holy Family Ministries
DTC #: 0164, Code: 40
Account Number: 3411-4961

Holy Family Ministries tax ID: 36-4320533

Once the stock is received and transferred into HFM's account, we will be notified.

Please copy Holy Family Ministries on your broker correspondence and include any gift designation if applicable. In your correspondence, please include your name, the name of stock, number of shares, and name of brokerage.

Please email to lvalentino@hfm.org or mail to:

Holy Family Ministries
2215 Enterprise Drive, Suite 1510
Westchester, IL 60154

For Assistance

Holy Family Ministries: Please contact Laura Valentino, Chief Development Officer, at lvalentino@hfm.org or 630.596.6211.

Brokerage: Please contact Brian.Thrasher@captrust.com or Matt.Winton@captrust.com. Captrust offices are located at 71 South Wacker Drive, Suite 3490, Chicago, IL 60606.