

## *Ukrainian Catholic Education Foundation*

### **Putting Your Stock in the UCEF**

Donating stock is a popular giving option among UCEF supporters. Below are the instructions on how to do so. The following page is a form for communicating transfer instructions to one's brokerage firm.

**1. Basic delivery instructions.** The delivery instructions for stock being transferred from a brokerage firm are as follows.

The Vanguard Group  
DTC Clearing 0062  
Ukrainian Catholic Education Foundation  
Sweep Account #17932898  
Donated by: \_\_\_\_\_

*BEFORE sending shares*, please contact our Vanguard representative, Tom Russo: 800-567-5163x10289.

**2. Additional information.** Other information that may be needed by the delivering brokerage firm could include the following:

The Vanguard Group  
455 Devon Park Drive  
Wayne, PA 19087

**3. If the stock to be transferred is at Vanguard.** If the stock to be transferred to the UCEF is held in an account at Vanguard, the donor can simply write a letter authorizing the transfer of stock from his/her account to the UCEF's account.

**4. Form attached.** Some donors have found that the form attached to this page, titled "Donation of Securities to the UCEF," is useful to communicate the transfer instructions to their brokerage firm. But this form may not be accepted by all brokerage firms, as some brokerage firms require their customers to complete their own customized forms.

**5. A word about December transfers.** Please initiate end-of-year transfers early to avoid year-end backlogs on Wall Street, if possible. Please contact our representative at Vanguard to inform him that you will be donating stock PRIOR to sending the shares. You can also contact us, and we will contact Vanguard for you.

**6. Transfers of stock in multiple companies.** If you have stock in multiple companies (e.g., more than 15), please contact us for special transfer instructions relating to a partial automatic account transfer process.

**7. Questions?** The above information is sufficient for most transfers of stock, but if you run into any problems or have any questions please do not hesitate to write or call the UCEF (773-235-8462 or nbosacoma@ucef.org) or its investment advisor, Tom Russo, at 800-567-5163 x 10289.

**8. Thank you.** Thank you for your generosity!

*Have you remembered the UCEF in your will or estate plan?*

## DONATION OF SECURITIES TO THE UCEF

**To:** Broker \_\_\_\_\_  
Company \_\_\_\_\_  
Account # \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_

**From:** Name \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_

**Date:** \_\_\_\_\_

**RE:** The Vanguard Group (DTC #0062)  
455 Devon Park Drive  
Wayne, PA 19087

After having alerted our Vanguard representative, Tom Russo, at 800-567-5163 x10289, please DTC transfer the following securities to the Ukrainian Catholic Education Foundation's account # 17932898 at Vanguard:

\_\_\_\_\_  
\_\_\_\_\_

Please ensure that all deliveries include the Foundation's full name and Fidelity account number.

Please send a copy of the transfer to the UCEF at: 2247 W. Chicago Ave., Chicago, IL 60622.

If you have any questions, please call the UCEF at 773-235-8462 (or email nbosacoma@ucef.org).

\_\_\_\_\_  
Donor's Signature

\_\_\_\_\_  
Joint Donor's Signature

