



**Instructions:**

After completing this form with your investment advisor, please send a copy to the Catholic Foundation at [development@salinadiocese.org](mailto:development@salinadiocese.org). Your advisor must initiate the transfer from your account — the Foundation and CapTrust are not able to request shares on your behalf. Once we receive your form, we will alert CapTrust so your gift can be properly identified when it arrives.

[matthew.taylor@captrust.com](mailto:matthew.taylor@captrust.com)

[blaise.heckman@captrust.com](mailto:blaise.heckman@captrust.com)

**Section 1:**

Name(s) of security or mutual fund and number of shares:

\_\_\_\_\_ shares  
\_\_\_\_\_ shares

Please direct gift to: (specific ministry, parish, school, Bishop's Annual Appeal, endowment fund, etc)

1) \_\_\_\_\_ Percent split  
2) \_\_\_\_\_ Percent split  
3) \_\_\_\_\_ Percent split

\*Gifts to the Diocese of Salina or Catholic Foundation will be used for general purposes unless otherwise indicated above

**Section 2:**

Brokerage Firm Name / Contact Name / Phone # \_\_\_\_\_

Account Registration / Name(s) on Account \_\_\_\_\_

Account Number \_\_\_\_\_

Receiving Account Information:

Firm: Charles Schwab & Co., Inc

DTC:0164

For credit to: Catholic Foundation for Diocese of Salina

Account Number:5221-2817

*If you have any questions regarding this transfer, please contact Matt Taylor 816-802-6601, or Blaise Heckman 816-802-6613, at CAPTRUST*

**Section 3:**

Donor Signature

Donor Signature

Date

Date

Donor Name (Printed)

Donor Name (Printed)

\*This gift transfer needs to be signed by all account owners exactly as the name(s) appear on the owner's account.

Donor Address:

Street Address

City

State

Zip

Phone

103 N. 9TH ST

SALINA, KS 67401

785-827-8746

SALINADIOCESE.ORG