



Transfer Instructions for making a Gift of Securities to Notre Dame-Cathedral Latin School

Thank you for your consideration of making a gift of securities to NDCL. Below are the directions for transferring securities. We kindly ask that you contact Justin Turk at Justin.Turk@ndcl.org prior to completing the stock transfer to ensure that your gift is properly acknowledged and designated.

If you have any questions, please call the NDCL Finance Office at 440.279.9332, and we will be happy to help you with your transfer.

Types of Transfers

- **DTC Transfer**— This is a convenient way to transfer your securities. Simply instruct your broker to electronically transfer your securities out of your account into Notre Dame-Cathedral Latin's Fidelity account, managed by Clearstead. Your broker will need the following information:
Account name: **Notre Dame-Cathedral Latin School**
Account number: **628-074266**
DTC number: **0226**
Contact: Joe Adams
Clearstead
1100 Superior Avenue East Suite 700
Cleveland, Oh 44114
Phone 216.621.1090
jadams@clearstead.com
- **Certificate Transfer** —Transferring your certificate can be as easy as endorsing the back of the certificate and sending it by certified mail to Notre Dame-Cathedral Latin School. You must sign the certificate in front of a bank officer to obtain a Medallion Signature Guarantee (notary public stamps are not an acceptable guarantor for stock certificates.) A medallion signature guarantee is required on all certificates. Be sure to endorse the certificate exactly as your name(s) appears on the front. For example, if your certificate is listed as "John F. and Mary P. Jones," you will need to sign the certificate exactly as "John F. Jones" and "Mary P. Jones." Next, write Notre Dame-Cathedral Latin School's tax identification number, 200039266, in the box on the back requesting a social security number or other identifying number of assignee. Mail it by certified mail to:

**Notre Dame-Cathedral Latin
School Attn: Justin Turk
13000 Auburn Road
Chardon, OH 44024**
- **Employee Owned Stock in Non-Retirement Plans**— If you purchased stock from your employer (e.g. non-retirement E.S.O.P.) you can instruct them to issue a certificate in Notre Dame-Cathedral Latin School's name. They will need our tax identification number, and our address as mentioned above.

Disclaimer: The information contained in this article is not intended as a substitute for wise tax counsel. We strongly recommend you consult with a professional tax advisor before making a gift of securities.