

Calumet College



of Saint Joseph

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ccsj.edu

## DTC TRANSFER INSTRUCTION SHEET

### IMPORTANT

- 1 Please complete this form and forward it to your financial advisor.
  - 2 Please also forward a copy of this form to the Office of Institutional Advancement by email to [ediaz2@ccsj.edu](mailto:ediaz2@ccsj.edu) or fax to (219) 473-4259 (ATTN: Inst. Advance) as donor information does not always transmit through the DTC wiring system.
- If you have any questions, please contact Ester Diaz at (219) 473-4388 or via email at [ediaz2@ccsj.edu](mailto:ediaz2@ccsj.edu).

### DTC Transfer Instructions for Financial Advisors

To (Donor's Financial Advisor)

Telephone

FAX

Please use this form as authorization to transfer the securities listed below from my account to Cetera as my gift to Calumet College of St. Joseph.

For gifts of securities to Calumet College of St. Joseph, please deliver by DTC to:

Cetera

DTC (electronic transfer account): #0701

Account Number: 2US15418

College Tax ID: 35-1087173

From (Donor Name)

Address

Name of Security

Number of Shares

Gift Purpose

Who, in addition to the legal donor, should receive recognition for gift?

Signature

Office of Institutional Advancement

2400 New York Avenue • Whiting, IN 46394 • Tel. 219-473-4318 • [development@ccsj.edu](mailto:development@ccsj.edu)