How to Transfer

Stocks, Bonds, and Mutual Funds

Christ the King Passionist Retreat Center

Donations of DTC-Eligible Stocks and Bonds

The fastest and easiest way to make a stock gift to **Christ the King Passionist Retreat Center** is to do an electronic transfer. Your broker will need the following information:

Broker: Charles Schwab and Company, Inc.

DTC Clearing: 0164, Code 40

For Deposit To: The Congregation of the Passion, Holy Cross Province
(For Christ the King Passionist Retreat Center)

Account Number: 4422-0451

Registration Type: Charity Non-Profit

Typically, securities submitted to DTC for transfer are delivered within 7 business days.

Donations of Mutual Funds

If marketable shares of mutual funds are in the custody of your financial institution and you wish to transfer them to **Christ the King Passionist Retreat Center,** follow these instructions:

Broker: Charles Schwab and Company, Inc.

Address: Attn: Mutual Funds
101 Montgomery Street
San Francisco, CA 94104

For Deposit To: The Congregation of the Passion, Holy Cross Province
(For Christ the King Passionist Retreat Center)

Account Number: 4422-0451

Registration Type: Charity Non-Profit

Typically, securities submitted for transfer are delivered within 7 – 10 business days.

Please contact us with the following information so we can express our gratitude for your gift.

- Your name
- Your phone number
- Name of the securities being gifted
- Number of securities being gifted
- Your broker's name and contact information
- Any restrictions that you are placing on your gift

Please contact: Sandra Gill, in the Development Office. Sandra can be reached at sgill@passionist.org or (916) 725 4720 - Opt 3.

We are so grateful for your gift.

May the Passion of Jesus Christ be Always in our Hearts!