



How to Transfer Stock to Kate's Club

Stock Transfer Information

Charles Schwab

DTC: 0614

CODE#: 40

ACCOUNT#: 5154-660

ACCOUNT NAME: Kate's Club Charity Non-Profit Account

PHONE#: 877-824-3817

****IMPORTANT****: In order to properly credit and acknowledge your gift, please email a copy of your transfer letter to Courtney Parsons, courtney.parsons@katesclub.org with the following information:

- Name of Stock
- Symbol
- Number of Shares
- Date of Transfer
- Donated by
- Address/City/State/Zip
- Brokerage Firm
- Brokerage Phone #

Kate's Club Federal Tax ID # is 16-1646487. A tax receipt confirming the donation will be sent to you once the transfer is finalized. If you have any questions, please contact Jamie Anderson, Director of Development, at 813-777-2508 or jamie.anderson@katesclub.org.

Thank you for supporting Kate's Club!

Kate's Club
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