INSTRUCTIONS FOR DTC TRANSFER OF SECURITIES
TO THE UNIVERSITY OF NOTRE DAME

To transfer securities to the University of Notre Dame via DTC, please use the following instructions:

DTC #0164, Code 40
University of Notre Dame Charles Schwab Account No. 8992-3609
Donor Name & Address: ________________________________
University of Notre Dame Tax ID: 35-0868188

In order to promptly and accurately credit a security gift to the appropriate donor, it is essential that the transfer instructions include the donor’s name and address.

In addition, please email Lisa Kresnak at ekresnak@nd.edu with the number of shares and securities you are transferring.

In order to determine if a security gift is to be an unrestricted gift or to be applied to a specific use or purpose, please contact Stacy Koebel-Harder in our Development Office at (574) 631-5546 or e-mail her at skoebel@nd.edu.

If your broker requires further information, he or she should contact a Controller Office representative or:

Charles Schwab & Co., Inc.
137 North Meridian Street
Indianapolis, IN 46204
(800) 435-4000

Notre Dame Controller Office Contacts are:

Primary Contact:
Lisa Kresnak
Senior Accountant, Security Gifts
University of Notre Dame
Notre Dame, IN 46556
E-Mail: ekresnak@nd.edu
(574) 631-9947
Fax: (574) 631-8549

Jason Little
Associate Controller
833 Grace Hall
University of Notre Dame
Notre Dame, IN 46556
46556 E-Mail:
jlittle1@nd.edu (574)
631-3579
Fax: (574) 631-8549

Drew Paluf
Associate Vice President for Finance and Controller
805 Grace Hall
University of Notre Dame
Notre Dame, IN 46556
E-Mail: apaluf@nd.edu
(574) 631-6401
Fax: (574) 631-8549

Revised: 02/01/17