

**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](mailto: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 at [skoebel@nd.edu](mailto: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

To obtain a **BIN** number for **Mutual Fund** gifts please contact [Lisa Kresnak](mailto:Lisa Kresnak) for instructions

Notre Dame Controller Office Contacts are:

**Primary Contact:**

**Lisa Kresnak**

**Manager, Brokerage  
Services**

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(574) 631-9947

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