

**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 **Gift Management** in our Development Office at (574) 631-5150 or please email givegift@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

If you need a **BIN** number for **Mutual Fund** gifts please contact Lisa Kresnak for instructions.

For your protection, please redact any highly sensitive information such as SSN on forms emailed to ND.

Notre Dame Controller Office Contacts are:

Primary Contact:

Lisa Kresnak
Manager, Brokerage Services
808 Grace Hall
University of Notre Dame
Notre Dame, IN 46556
E-Mail: ekresnak@nd.edu
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