

MOST HOLY ROSARY FOUNDATION

GIFT ASSET TRANSFER FORM INSTRUCTIONS

To transfer assets to Most Holy Rosary Foundation, Inc., please provide your broker with this completed form.

Please accept this letter as a request and authorization to execute the following gift transfer of assets from the referenced account.

Broker Name

Asset Description

Broker's Firm Name

Number of Shares

Broker's Address

Date of Transfer

Please provide your broker with the Charles Schwab DTC Instructions for Most Holy Rosary Foundation as follows:

DTC #0164

Most Holy Rosary Foundation Inc.

Account #6772-1904

Please contact Sharon Craig at Rockbridge Investment Management if you have any questions. scraig@rockbridgeinvest.com or (315) 671-1985.

Donor Information

Account Number: _____

Name: _____

Address: _____

Phone Number: _____

Donor Wishes

Unrestricted Gift: _____ School Restricted Gift: _____ Church Restricted Gift: _____

Sincerely,

Signature: _____

If you have any questions, you can reach David Hardy, President of the Most Holy Rosary Foundation, by email at dhardy330@gmail.com or by phone at (315) 559-6740. Please forward a copy of this form to us so that your gift may be credited appropriately.