

To transfer a gift of stock through your broker, please follow the instructions below. The preferred method of transfer is to have the donor's broker do a DTC transfer to Franciscan Media's account at Charles Schwab.

The broker will need the following information:

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Franciscan Media:  
Maureen Heckmuller  
513-236-0122  
[mheckmuller@franciscanmedia.org](mailto:mheckmuller@franciscanmedia.org)  
DTC#: 0164  
Registration: Franciscan Media, LLC  
Schwab acct#: 2444-3970

Broker Contact:  
Jacob Kennedy  
VP Financial Consultant  
513-361-8616  
[jacob.kennedy@schwab.com](mailto:jacob.kennedy@schwab.com)

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The transfer must include Franciscan Media's name and account number in order for it to be routed correctly. The broker should contact the broker listed above by email or phone prior to the transfer with the name of the stock, the number of shares and the approximate date of the transfer.

The broker or donor is also requested to inform Maureen Heckmuller, Controller, prior to the transaction at [mheckmuller@franciscanmedia.org](mailto:mheckmuller@franciscanmedia.org) or 513-236-0122.

The acknowledgement to the donor will indicate the name of the stock, number of shares and date of the transfer. The book value of the donation for Franciscan Media will be the mean market value of the stock on the transfer date. Per Franciscan Media policy, the stock will be sold immediately after the transfer. The donor assigns the monetary value for their own tax records.