

2025

**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: \_\_\_\_\_

**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. Without this information we are unable to identify the donors of certain securities.**

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 e-mail at [givegift@nd.edu](mailto: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) 217-2421 or (317) 634-2484

Notre Dame Controller Office contacts are:

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*If you or your broker have reason to believe that the securities you intend to transfer will be subject to any restrictions on public sale, including restrictions imposed by Securities and Exchange Commission Rules and Regulations, please contact the Office of Gift Planning at [giftplanning@nd.edu](mailto:giftplanning@nd.edu) or 574-631-7164 before initiating the transfer.*