



Offices of Advancement and Finance

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Steps for CRB Stock Transfer

- 1) Donor should inform CRB Advancement/Finance Office of transaction, including the following details:
 - a. Type of stock
 - b. Quantity
- 2) Donor's broker will DTC the stock to CRB's broker National Financial
 - a. In order to DTC the stock, broker will need the following information:
 - i. National Financial's DTC # is 0226
 - ii. CRB's Brokerage Account # is LUL-128627
- 3) Once the transfer is initiated, CRB's Account Executive will notify CRB

*For any questions, please feel free to reach out to CRB's Account Executive:

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