

GIFTS OF SECURITIES

INSTRUCTIONS:

Do not sell the stock – instead the most common method to make a donation of stock is to have your broker transfer the stock electronically to the account of the Archdiocese of Philadelphia and **100% of the net proceeds from the sale of your stock will go to the entity you specify**. If you own stock in a certificate form, please call the Office for Investment Services for instructions.

The donor, not the Parish or the Archdiocese, must be the party that initiates the transfer of stock with his/her agent/broker. Please supply the following information to your broker to have the stock donation transferred electronically:

DTC #: 0141 (First Clearing, LLC / Wells Fargo)
Account #: 1176-3039
Name of Account: Archdiocese of Philadelphia
Broker McCloskey Financial Group

Please do not use the parish name as the account name. The account name must be the Archdiocese of Philadelphia.

Important: The donor (or their broker/transfer agent) must contact the Archdiocesan Office for Investment Services before the transfer is executed to ensure the stock donation can be identified with the donor name when it arrives in the Archdiocese of Philadelphia's brokerage account, and to make certain you are properly credited for your stock donation. Please submit the following information:

Date _____

Donor Name(s) _____

Address _____

City _____ State _____ Zip _____

Phone Number: _____

Email Address: _____

Recipient of Donation: _____

Name of Stock:

(1) _____ Number of Shares _____

(2) _____ Number of Shares _____

You can either e-mail or phone in the required information above to:

Al Tomaselli

Phone: (215) 587-3693

Fax: (215) 587-3939

E-mail: ATomasel@archphila.org

Robert Gunn

Phone: (215) 587-3969

Fax: (215)-587-3939

E-mail: RGunn@archphila.org

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