

Roman Catholic Diocese of Raleigh, Catholic Charities of the Diocese of Raleigh and The Foundation of the Roman Catholic Diocese of Raleigh

STOCK DONATION INSTRUCTIONS

Gifts of stock may be made via electronic transfer. The Diocese of Raleigh maintains a brokerage account with Wells Fargo Advisors for the purpose of processing stock transfers to the Diocese for the benefit of the Diocese or any of its parishes, schools or agencies. **The Diocese cannot initiate stock transfers on your behalf. You must contact your broker directly. If the Diocese does not receive this form, we may be unable to identify electronically-transferred stock.**

NOTICE OF STOCK DONATION (please complete all highlighted sections):

Your Name: _____ Parish: _____

Your Address: _____
(Street) (City) (State) (Zip)

Phone: _____ email: _____

Name of stock and number of shares donated: _____

Please apply my gift towards: (BAA, Offertory, Capital Campaign, Catholic Charities, etc.)

If securities are electronically transferred, the gift date is the date the securities enter our account at Wells Fargo Advisors. For hand-delivered securities to the Diocese or Wells Fargo Advisors, the gift date is the date received. If the securities are mailed to the Diocese, the gift date is the date of the mailing (recommend sending by registered mail). Stock market fluctuations after the date of delivery (as defined above) will not affect the charitable deduction for tax purposes.

Wells Fargo Advisors has instructions to sell stock as soon as possible (usually by the business day following their receipt of the stock). The charitable deduction amount will be applied as you requested above and will be calculated based on the average price per share on the date the securities entered our Wells Fargo account (or the date received for hand-delivered securities, or the mailing date for securities mailed).

Please email or mail copies of page 1 to:

Roman Catholic Diocese of Raleigh
Attn: Office of Development
7200 Stonehenge Drive
Raleigh, NC 27613
Development.Support@OODDOR.org
(984) 900-3192

A. ELECTRONIC TRANSFER BY BROKER

This section is to facilitate the transfer with your broker. Please communicate the following information to your broker (the Diocese cannot initiate the stock transfer on your behalf):

To: _____
(Broker's Name & Company)

Please transfer _____ shares of _____ stock from my
Account _____ to:

Wells Fargo Advisors
3105 Glenwood Avenue, Suite 201
Raleigh, NC 27612
James Mosrie, Private Client Financial Advisor
984-349-5637 james.mosrie@wellsfargo.com

ROMAN CATHOLIC DIOCESE OF RALEIGH
ACCOUNT # 8288-0036
DTC # 0141

I / we hereby authorize the above stock transfer:

(Signature) (Date) (Signature) (Date)

B. DIRECT DONATION OF CERTIFICATE

1. If the certificate is titled in the **name of the donor**:
 - a. Your signature(s) on the certificate **MUST** be medallion guaranteed. Please do not fill-in any other information on the certificate. The medallion guarantee of your signature can be done at our Wells Fargo Advisors office or at another financial institution (bank branches, brokerages, etc).
 - b. Include a "letter of intent" with your name, address, stock, number of shares and donation instructions, i.e., "donation to Diocese of Raleigh for the benefit of..... (Bishop's Annual Appeal, offertory, etc.)".
 - c. Send by registered mail (or deliver) to the Diocese of Raleigh or deliver to a Wells Fargo Advisors office (do not deliver stock to a Wells Fargo Bank location).
 - d. Send copy of this two-page completed form to the Diocese of Raleigh (address below).

2. If the certificate is titled in the **name of the Diocese of Raleigh**:
Send by registered mail (or deliver) to the Diocese, along with this two-page completed form.