

**STOCK DONATION INFORMATION**

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

**PLEASE PROVIDE ALL INFORMATION REQUESTED:**

**NOTICE OF STOCK DONATION:**

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, Parishes, Schools, etc.)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

For Donations via Electronic Transfer, please see: **A. ELECTRONIC TRANSFER BY BROKER** on page 2.

For Donations via Certificate, please see: **B. DIRECT DONATION OF CERTIFICATE** on page 2.

If securities are electronically transferred, the gift date is the date the securities enter our account at Wells Fargo Advisors, LLC. For hand-delivered securities to the Foundation or Wells Fargo Advisors, LLC, the gift date is the date received. If the securities are mailed to the Foundation, 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, LLC 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, fax, or mail copies of pages 1 and 2 to:

The Foundation of the Roman Catholic Diocese of Raleigh  
ATTN: Maureen O'Keeffe Lindgren  
4700 Homewood Court, Suite 320  
Raleigh, NC 27609  
Phone 919-568-1065  
Fax 919-568-3241  
Maureen@foundationDOR.org

**A. ELECTRONIC TRANSFER BY BROKER**

Please communicate the following information to your broker:

To: \_\_\_\_\_  
(Broker's Name & Company)

Please transfer \_\_\_\_\_ shares of \_\_\_\_\_ stock from my  
Account \_\_\_\_\_ to:

**Wells Fargo Advisors, LLC  
3105 Glenwood Avenue, Suite 201  
Raleigh, NC 27612  
David Wiley – 919-571-2806**

**THE FOUNDATION OF THE  
ROMAN CATHOLIC DIOCESE OF RALEIGH  
ACCOUNT # 6012-1478  
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 The Foundation of the Roman Catholic Diocese of Raleigh for the benefit of..... (Bishop's Annual Appeal, offertory, etc.)".
  - c. Send by registered mail (or deliver) to the Foundation 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 Foundation (address below).
  
2. If the certificate is titled in the **name of The Foundation of the Roman Catholic Diocese of Raleigh**:  
Send by registered mail (or deliver) to the Foundation, along with this two-page completed form.

**Please email, fax, or mail copies of pages 1 and 2 to:**

**The Foundation of the  
Roman Catholic Diocese of Raleigh  
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4700 Homewood Court, Suite 320  
Raleigh, NC 27609  
Phone 919-568-1065  
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