

## STOCK DONATION FORM

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 Endowments, the Seminarian Partnership Program, Home Mission Society, and the Land Trust.

**The Foundation** cannot initiate stock transfers on your behalf. Please contact your broker directly.

**Please note: If The Foundation does not receive this form, we may be unable to identify electronically transferred stock.**

**PLEASE PROVIDE ALL INFORMATION REQUESTED BELOW.**

**NOTICE OF STOCK DONATION:**

Your Name: \_\_\_\_\_ Your Parish: \_\_\_\_\_

Your Address: \_\_\_\_\_  
(Street) (City) (State) (Zip)

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Name of stock : \_\_\_\_\_ No. of shares donated: \_\_\_\_\_

Please apply my gift toward:

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For Donations via Electronic Transfer, please see section A. ELECTRONIC TRANSFER BY BROKERAGE on page 2.

For Donations via Certificate, please see section A. 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 of 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

## STOCK DONATION FORM

### 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 ....."
  - 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**  
**ATTN: Maureen O'Keeffe Lindgren**  
**4700 Homewood Court, Suite 320**  
**Raleigh, NC 27609**

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