



Catholic Diocese of Memphis Stock Donation Procedures

Thank you very much for your interest in donating stock to the Diocese of Memphis or to one of its parishes, schools, or other institutions. To complete your donation, please follow the steps outlined below. If you need further assistance, please call the Development Office at (901) 373-1220.

1. Complete and mail the Stock Donation Letter of Intention

To begin the process of donating stock, please complete the Stock Donation Letter of Intention. Mail or e-mail the Letter of Intention to the Development Office of the Diocese. Without this Letter of Intention, we will not know where to send the proceeds of the donation.

2. Transfer the stock

You may transfer stock by one of three methods: electronically (preferred), by mail, or in person.

a. To transfer the securities electronically:

1. Request that your bank or broker notify Charles Schwab of the electronic transfer.
2. Provide your bank or broker with the following information:
 - Wedbush DTC #0164
 - Catholic Diocese of Memphis Tax ID #62-0845508
 - Catholic Diocese of Memphis Account #2865-8304

b. To transfer the certificates by mail:

1. **DO NOT SIGN** the stock certificates.
2. By registered mail, send the stock certificate(s) along with the Letter of Intention to the Development Office, attention Allison Thron. Request a signature as proof of receipt.
3. **In a separate envelope**, also by registered mail and requesting proof of receipt, send a signed *Irrevocable Stock or Bond Power* form to Allison Thron at the Diocese to transfer ownership to the Diocese. You need only sign and date this form. If you wish, you may enter: parish and Diocese name in the upper left, number of shares and stock name. You need not enter your social security number.

c. To deliver the securities in person:

1. **DO NOT SIGN** the stock certificates.
2. Call the Development Office at (901) 373-1220 to arrange a time to deliver the Letter of Intention, the stock certificates, and a signed *Irrevocable Stock or Bond Power* form to the Diocese of Memphis.

3. Payment Processing and Acknowledgement of Donation

The Development Office acts as a clearing house for donations of stocks. When stocks are donated, our brokerage firm liquidates them and sends the resulting cash to us along with a trade confirmation form. We will then send the cash and the trade confirmation form to the parish, school or other institution that is the final intended recipient of the donation. We will only know where to forward this payment based on the information provided in the Letter of Intention (see #1 above).

The donor can expect to receive acknowledgement of their contribution from the Development Office. Acknowledgement will include pertinent information about the donation, including the date of donation, description of stocks, and number of shares. The acknowledgment will not include a valuation of the donation. It is the responsibility of the donor to establish the value of the donation for his or her own tax purposes (per IRS regulations).



Catholic Diocese of Memphis
Stock Donation Letter of Intention

To the donor: please complete this form for all stock donations. If you need further assistance, please call Allison Thron in the Development Office at (901) 373-1220 or email allison.thron@cc.cdom.org.

Date _____

Intention of Donation: _____

From (please print):

Donor name(s) _____
Address _____
City, State, Zip _____
Telephone _____
Email _____

To:
Allison Thron, Assistant Director of Development
Catholic Diocese of Memphis
5825 Shelby Oaks Drive
Memphis, TN 38134

Copy:
Diocese, Parish or other ministry for which the donation is intended

Dear Allison Thron:

Please accept our donation of _____ shares of _____
(# of shares) (Name of security)

to be credited to the Catholic Diocese of Memphis for the benefit of:

Parish or other institution _____
Address _____
City, State, Zip _____

I (we) plan to transfer the securities (please check one of the following):

_____ electronically through broker
_____ by mail
_____ delivered in person

Donor signature

Donor signature