

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 Wachovia Securities 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 can not initiate stock transfers on your behalf. You must contact your broker directly.**

PLEASE PROVIDE ALL INFORMATION REQUESTED:

NOTICE OF STOCK DONATION:

Name: _____ Parish: _____

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

Phone: _____ (work) _____ (home)

Name of stock and shares donated: _____

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

CARDINAL GIBBONS HIGH SCHOOL _____

If securities are electronically transferred, the gift date is the date the securities enter our account at Wachovia Securities. For hand-delivered securities to the Diocese or Wachovia Securities, 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.

Wachovia Securities has instructions to sell stock as soon as possible (usually by the business day following their receipt of the stock). The actual net proceeds from the sale represent the amount that will be applied as you requested above. The net proceeds will be affected by the actual sale price, as well as a broker charge to process the transaction. Accordingly, there will be a variance between the charitable deduction amount and the net proceeds applied from the gift. The Diocese can not be responsible for any variance in these amounts.

Please send copies of Pages 1 and 2 to:

**Dave Winters – dave.winters@raldioc.org
715 Nazareth St.
Raleigh, NC 27606-2187
(919) 821-9725; Fax (919) 821-9768**

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:

Wachovia Securities
3105 Glenwood Ave. Suite 201
Raleigh, NC 27612
David Wiley – (919)571-2806
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 certificate is titled in the name of the donor:
 - a. Sign certificate
 - b. Include a "letter of intent" with your name, address, stock and shares and intent (e.g., Diocese of Raleigh - God's Work Our Challenge)
 - c. Send by registered mail (or deliver) to the Diocese or deliver to a Wachovia Securities office. Do not deliver stock to a Wachovia Bank location.
 - d. Send copy of this two page completed form to the Diocese
2. If certificate is titled in the name of the Diocese:
 - a. Send by registered mail (or deliver) to the Diocese, along with this two page completed form.

PLEASE SEND COPIES OF PAGES 1 AND 2 TO:

Dave Winters – dave.winters@raldioc.org
715 Nazareth St.
Raleigh, NC 27606-2187
(919) 821-9725; Fax (919) 821-9768