

ARCHDIOCESE OF BOSTON

Stock Donation

The following is to help you complete your generous donation to the Archdiocese of Boston. If you have any questions please contact Glen Mattera, Director of Finance at 617- 746-5968 or Glen_Mattera@rcab.org

For all Securities donations, whether electronically transmitted or delivered as physical certificates, a Donor Letter of Intention (attached) must be completed and submitted. If you are donating physical securities (stock or bond certificates), you will also need to provide an Irrevocable Stock or Bond Power from Deutsche Alex. Brown (attached).

Physical Security Donations- This includes a Donor Letter of Intention to Donate Stock and Irrevocable Stock or Bond Power. We ask that you ***DO NOT SIGN/ ENDORSE*** the stock certificate(s). Please complete the Donor Letter and Stock Power (sign exactly as your name appears) and submit separately from the actual stock certificate to:

Glen Mattera
Director of Finance
Archdiocese of Boston
66 Brooks Drive
Braintree, MA 02184

Hand Delivery of Security Donations- If you feel you must deliver the securities in person, we ask that you deliver them to:

Glen Mattera
Director of Finance
Archdiocese of Boston
66 Brooks Drive
Braintree, MA 02184

Please call (617-746-5968) or email (Glen_Mattera@rcab.org) in advance of delivery so that a time can be arranged to receive your stock or bond donation, the Donor Letter of Intention, and the Irrevocable Stock or Bond Power. Be certain to receive a signed confirmation / receipt for your donation.

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Electronic Security Donations- If your securities are held within a brokerage account, you can donate electronically. We would request that you call or email to inform us of the transaction (name of security and number of shares) so we can notify our Broker to be expecting it. Given new security laws, we are not able to accept securities without knowing in advance who is donating the securities. You can then execute your donation by instructing your Broker to transfer the securities as follows:

Deutsche Bank Securities
DTC Number 443 (cleared by Pershing LLC)
Account Number: 5XM247345
For the Benefit of: Roman Catholic Archbishop of Boston

The Donor Letter of Intention can then be submitted via U.S. Mail to:

Glen Mattera
Director of Finance
Pastoral Center
66 Brooks Drive
Braintree, MA 02184

You can also send this via facsimile to Glen Mattera, Director of Finance at 617-746-5762. A cover sheet must be included. If you have any questions for our Broker, please feel free to contact Eileen Murphy at 617-217-6155 or email at Eileen.Murphy@db.com.

Mutual Fund Donations- As there are various methods of transactions required to obtain funds from Mutual Fund accounts, we request that you contact Glen Mattera before making a mutual fund donation. She will be able to assist you with any such transaction. Often a mutual fund company will require that an account be established in the name of the donation recipient, in this instance the Archdiocese of Boston/ specific Parish/ School or Agency. We request that you do not attempt to establish such an account without our involvement as it may complicate the actual receipt of the funds in donation.

Please note that mutual fund donations experience a longer processing time, so keep this in mind when donating at the end of a calendar year or fund raising cycle.

THANK YOU FOR YOUR KIND GENEROSITY

ARCHDIOCESE OF BOSTON

LETTER OF INTENTION TO DONATE STOCK

Dear Donor,

Please complete this form for all Stock and/or Mutual Fund Donations, whether delivered physically or electronically. Return this form by mail, e-mail or fax to Claudia Ferullo. If you require any assistance, please contact Claudia Ferullo at 617-746-5714, by e-mail us at Cferullo@rcab.org or by fax at 617-779-4568.

I / We plan to transfer the following securities to the Archdiocese of Boston via:

	Electronically (Broker to Broker)
	Priority Mail (envelope included in package)
	Hand Delivered to: Provide Name

Donor Information:

Date of Donation:	
Name(s):	
Address:	
Telephone Number:	
Email Address:	

Please accept our donation of _____ Shares of _____
(# of Shares) (Name of Security)

This donation is to for the benefit of:

Catholic Appeal:	
Parish / School / Agency:	
Location:	
Primary Contact:	

(If you are donating various stocks/securities and/or to various locations simply Print VARIOUS above and attach a separate page with a list detailing the various gifts and locations that are to receive the gift(s).

Signature: _____ Date: _____

THANK YOU FOR YOUR KIND GENEROSITY

IRREVOCABLE STOCK OR BOND POWER

FOR VALUE RECEIVED, the undersigned does (do) hereby sell, assign and transfer to

(SOCIAL SECURITY OR TAXPAYER IDENTIFICATION NO.)

IF STOCK,
COMPLETE
THIS
PORTION

_____ shares of the _____ stock of _____
represented by Certificate(s) No(s). _____
inclusive, standing in the name of the undersigned on the books of said Company.

IF BONDS,
COMPLETE
THIS
PORTION

_____ bonds of _____
in the principal amount of \$ _____, No(s). _____
inclusive, standing in the name of the undersigned on the books of said Company.

The undersigned does (do) hereby irrevocably constitute and appoint _____
attorney to transfer the said stock or bond(s). as the case may be, on the books of said Company, with full power
of substitution in the premises.

Dated _____

(PERSON(S) EXECUTING THIS POWER SIGN(S) HERE)

IMPORTANT - READ CAREFULLY

The signatures(s) to this Power must correspond with the name(s) as written upon the face of the certificate(s) or bond(s) in every particular without alteration or enlargement or any change whatever. Signature guarantee should be made by a member or member organization of the New York Stock Exchange, members of other Exchanges having signatures on file with transfer agent or by a commercial bank or trust company having its principal office or correspondent in the City of New York.

C133 - Irrevocable Stock or Bond Power

SIGNATURE GUARANTEED

Deutsche Bank Alex. Brown

A Division of Deutsche Bank Securities Inc.

