



## RCAB Investments Letter of Intention to Donate Stock

Please complete this form for all Stock and/or Mutual Fund electronic donations. Return this form by e-mail to Jennifer Hwang. If you require any assistance, please contact Jennifer Hwang at 617-746-5731, or by e-mail at [stockdonation@rcab.org](mailto:stockdonation@rcab.org) or [jhwang@rcab.org](mailto:jhwang@rcab.org).

Please accept our donation of \_\_\_\_\_ Shares of \_\_\_\_\_  
(# of Shares) (Name of Security)

### Donor Information:

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

Please see instructions for information on sending securities to RCAB brokerage.

### This donation is to for the benefit of:

Catholic Appeal:		Parish/School:		Agency:		Other:	
Parish/School/Agency to be Credited:							
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***



## **RCAB Investments**

### **Stock and Mutual Fund Donation Instructions**

For any stock and/or mutual fund donation for the Archdiocese of Boston (Catholic Appeal, Parish, School, or Agency), the following instructions will walk you through the steps necessary to complete your donation. Should you require any further assistance, please contact Jennifer Hwang, the Stock Donation Coordinator by phone **617-746-5731**, or email **[stockdonation@rcab.org](mailto:stockdonation@rcab.org)**.

For all securities donations, a Letter of Intention to Donate Stock must be completed and submitted. This document will be provided in a donation package which is also available for download from our website at <https://www.bostoncatholic.org/stock-or-mutual-fund-donations>.

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***PREFERRED ELECTRONIC SECURITY DONATION***– Please call or email the Stock Donation Coordinator to inform them of the transaction (name of the security and number of shares) so we can notify our Broker. You can then execute your donation by instructing your Broker to transfer the securities as follows:

Alex Brown (cleared by Raymond James)  
DTC Number: 725, (0725 if 4 digits required)  
Account Number: 442NH218  
For the Benefit of: Roman Catholic Archbishop of Boston

The Letter of Intention to Donate Stock/Mutual Funds to be submitted via email to [stockdonation@rcab.org](mailto:stockdonation@rcab.org)

Should you have any brokerage questions, please contact Eileen Murphy at 857-504-7204.

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***ACKNOWLEDGEMENT OF DONATED SECURITIES*** - Upon receipt, RCAB contacts Alex Brown to sell donated shares at the current market value and forwards proceeds to the designated organization. RCAB then sends the donor an acknowledgement letter. This letter includes the donated stock or mutual fund, number of shares, the high, low and median (average of high and low) price of the security for the day it was received, and the intended recipient of the donation. The letter also includes the ***gift value***, which is the number of shares received multiplied by the ***median*** price.

***PROCEEDS VS. GIFT VALUE***: Upon settlement of the sold securities, the ***proceeds*** are received at RCAB and distributed to the donor's intended recipient. These proceeds are impacted by:

- Actual number of shares donated
- Share price at the time the security is sold
- Brokerage transaction fee deduction

**Please Note:** The acknowledgement letter includes only the gift value, not the proceeds.

***THANK YOU FOR YOUR KIND GENEROSITY***