



Our Cardinal's Campaign for
the Future of Our Catholic Faith

◆ Information About Donating Gifts of Stock ◆

Thank you very much for your intention to donate a gift of securities to the Archdiocese of Boston in support of the *Inspiring Hope Campaign*. Should you require a donation package, as discussed below, or need any further assistance, please contact Tom Lerner, the Stock Donation Coordinator at 617-746-5884, or email TLerner@rcab.org

For all donations of securities, whether electronically transmitted or delivered as physical stock certificates, a Donor Letter of Intention (form 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 Bank Alex Brown (form attached).

Donating Stock Electronically

If your securities are held within a brokerage account, you may easily donate your gift electronically. We 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:

Alex Brown
DTC Number 725 (cleared by Raymond James)
Account Number: 442NH218
For the Benefit of: Roman Catholic Archbishop of Boston

You can also send this letter via fax to Tom Lerner, Stock donation coordinator at Fax #617-779-4568. A cover sheet must be included. If you have any questions for our Broker, please feel free to contact Eileen Murphy directly at (857) 504-7204.

Donations of Stock Certificates

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:

Joseph Crehan, Controller
Archdiocese of Boston
66 Brooks Drive
Braintree, MA 02184

Hand Delivery of Stock Certificates

If you wish to deliver your securities in person, we ask that you deliver them to:

Joseph Crehan, Controller
Archdiocese of Boston
66 Brooks Drive
Braintree, MA 02184

Please call (617) 746-5884 or email TLarner@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. Please be certain to receive a signed confirmation/receipt for your donation.

Mutual Fund Donations

As there are various methods of transactions required to obtain funds from Mutual Fund accounts, we request that you contact the Stock Donation Coordinator at either 617-746-5884 or TLarner@rcab.org before making a mutual fund donation. He 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. 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.

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ACKNOWLEDGEMENT OF DONATED SECURITIES Upon receipt, RCAB contacts Alex Brown to sell donated shares at the current market value. 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:

- number of shares donated
- share price at the time the security is sold
- brokerage fee that is deducted. This brokerage fee generally causes the proceeds to be lower than the *gift value*.

Please Note: The acknowledgement letter includes only the gift value, not the proceeds. Since the donor's intended recipient receives the proceeds, the donor should consider carefully both the impact of the brokerage fee and the fluctuation of the stock market. Accordingly, the donor should discuss these impacts with his or her broker to determine the number of shares to donate.

THANK YOU FOR YOUR KIND GENEROSITY



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Donor Letter of Intention to Donate Stock

Please complete this form for all donations of Stock and/or Mutual Funds, whether they are delivered electronically or physically. If you require any assistance, please call Tom Larner, the Archdiocese of Boston Stock Donation Coordinator, at 617-746-5884 or email at tlarner@rcab.org

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

	Electronically (Broker to Broker)
	Priority Mail
	Hand Delivered

Donor Information:

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

Please accept our donation of _____ shares of _____
(# Shares) (Name of Stock)

This Donation is to for the Benefit of:

Organization:	Inspiring Hope Campaign c/o RCAB
Location:	
Primary Contact:	

Signature: _____ Date: _____

*THANK YOU FOR YOUR KIND GENEROSITY IN SUPPORT OF THE
Inspiring Hope Campaign*