



DIOCESE OF CAMDEN  
OFFICE OF DEVELOPMENT

## HOW TO MAKE A GIFT OF SECURITIES

Gifts of appreciated securities may have significant tax benefits. All gifts of securities are tax deductible to the fullest extent of the law. The Diocese of Camden maintains a custodial relationship with **PNC Bank, NA.** for the purposes of transferring securities.

1. Complete and mail Part I to the **Office of Development** so that we may properly acknowledge and credit your gift.

### **IF SECURITIES ARE HELD BY A BROKER**

2. Complete the letter of authorization in Part II, and submit it to your broker. Your broker can directly transfer your stock to the Diocesan account.

### **OR ARE HELD IN A MUTAL FUND**

2. Please DO NOT establish an account at the mutual fund in the name of Diocese of Camden. PNC Bank, NA will establish a shell account at the fund in its nominee name and provide you with the account number so that you may complete this transfer. Please contact Erika Egger, Account Manager at PNC Bank, NA (412-762-7089 or erika.egger@pnc.com) for additional information.

### **OR ARE HELD IN CERTIFICATE FORM**

2. Complete the Irrevocable Stock or Bond Power in Part III. Complete the section for stock (box A) or bond (box B) portion and date. Please have your signature guaranteed (services generally provided at your local bank) on the bottom of the page. **Please do not complete the other sections of the form.** (See sample on page 5.) Send to the Office of Development with Part I.
3. If you are not donating the full value of the stock certificate, please be sure Part I clearly indicates the number of shares being donated.
4. Send the unsigned stock or bond certificate in a separate envelope from the completed forms (Part I and III) to the Development Office.

For delivery instructions or additional inquiries, please contact:

Mr. James J. Lanahan, Director  
Office of Development – Diocese of Camden  
631 Market Street  
Camden, NJ 08102  
Phone: (856) 583-6125  
Email: [jlanahan@camdendiocese.org](mailto:jlanahan@camdendiocese.org)  
Fax: (856) 338-0766

**PART I: NOTICE OF STOCK GIFT TO THE OFFICE OF DEVELOPMENT**

**Gift for/to:** \_\_\_\_\_  
(House of Charity/Parish/Diocesan Entity/Diocese of Camden/Scholarship Fund)

Name of individual(s)  
or entity making the gift: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Home Phone #: \_\_\_\_\_ Work Phone #: \_\_\_\_\_

Cell Phone #: \_\_\_\_\_ Email Address: \_\_\_\_\_

Parish: \_\_\_\_\_ City: \_\_\_\_\_

Name and quantity of stock/bond being transferred: \_\_\_\_\_

Date Transfer was requested: \_\_\_\_\_ (value of donation is determined by  
the average value of the securities the day the Diocesan custodian *receives* the transfer)

Donor's broker/agent:

Name: \_\_\_\_\_ Brokerage: \_\_\_\_\_

Work Phone #: \_\_\_\_\_ Cell Phone #: \_\_\_\_\_

Check here to indicate that you have sent the Letter of Authorization in Part II to your  
broker/agent.

Please complete and mail or fax this form (Part I) to us so that we may properly credit and  
acknowledge your gift.

James J. Lanahan, Director  
Office of Development  
Diocese of Camden  
631 Market Street  
Camden, NJ 08102  
Phone: (856) 583-6125  
Fax: (856) 338-0766

If you have any further questions regarding the transfer of stock or other securities, please  
contact James Lanahan in the Office of Development at (856) 583-6125. Thank you.

**PART II: Letter of Authorization - Please mail/Fax to Broker**

Date: \_\_\_\_\_

Dear \_\_\_\_\_,  
(Broker's Name)

Please use this letter as authorization to contribute \_\_\_\_\_ shares of  
\_\_\_\_\_ from account number \_\_\_\_\_  
(Name of Security)

to the account of the Diocese of Camden. The date of my donation is: \_\_\_\_\_

**NOTE TO BROKER:** Please reference donor name on delivery wire.

DTC Participant #: 2616 PNC Bank  
Trust Account Name: Diocese of Camden Stock  
Trust Account Number: 21350013617806  
Attention: PNC Institutional Investments  
Erika Egger  
620 Liberty Avenue, 7<sup>th</sup> Floor  
Pittsburgh, PA 15222  
Phone: (412) 762-7089  
Fax: (800) 449-7382  
Email: erika.egger@pnc.com

I understand that the Diocese will sell the securities, and that the proceeds will benefit  
\_\_\_\_\_  
(House of Charity/Parish/Diocesan Entity/Diocese of Camden/Scholarship Fund)

I understand that the value of my gift is determined by the average value of the securities on the day the Diocesan custodian receives the stock transfer.

My information is as follows:

Full Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, ZIP: \_\_\_\_\_

Home Phone #: \_\_\_\_\_ Work Phone #: \_\_\_\_\_

Cell Phone #: \_\_\_\_\_ Email Address: \_\_\_\_\_

Parish: \_\_\_\_\_ City: \_\_\_\_\_

\_\_\_\_\_  
(Signature) (Date)  
\_\_\_\_\_  
(Signature) (Date)

**PART III: Irrevocable Stock or Bond Power Form - Please mail to the Diocese**  
(To Be Completed ONLY if donating with original stock certificates)

## IRREVOCABLE STOCK OR BOND POWER

FOR VALUE RECEIVED, the undersigned does (do) hereby sell, assign and transfer unto \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
(SOCIAL SECURITY OR TAXPAYER IDENTIFYING NO.)

**A: IF  
STOCK,  
COMPLETE  
THIS  
PORTION**

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

**B: 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 \_\_\_\_\_

x \_\_\_\_\_  
(Signature)

x \_\_\_\_\_  
(Signature)

*SAMPLE –*  
**COMPLETE HIGHLIGHTED SECTIONS ONLY**

**PART III: Irrevocable Stock or Bond Power Form - Please mail to the Diocese**  
(To Be Completed ONLY if donating with original stock certificates)

**IRREVOCABLE STOCK OR BOND POWER**

FOR VALUE RECEIVED, the undersigned does (do) hereby sell, assign and transfer unto \_\_\_\_\_

**DO NOT COMPLETE THIS SECTION**

*(SOCIAL SECURITY OR TAXPAYER IDENTIFYING NO.)*

**A: IF  
STOCK,  
COMPLETE  
THIS  
PORTION**

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

**B: 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 \_\_\_\_\_  
**DO NOT COMPLETE THIS SECTION**  
\_\_\_\_\_ 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 \_\_\_\_\_

Please check with your local bank for “**Signature  
Guarantee**” Services.  
Sign the form in the presence of someone who can  
provide this service.  
**NOTE: This is not a notary public service but  
something most banks offer.**

x \_\_\_\_\_  
(Signature)

x \_\_\_\_\_  
(Signature)

*SAMPLE –*  
**COMPLETE HIGHLIGHTED SECTIONS ONLY**