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 MUTUAL 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 Eggler, Account Manager at PNC Bank, NA (412-762-7089 or erika.eggler@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
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 Eggler
620 Liberty Avenue, 7th Floor
Pittsburgh, PA 15222
Phone: (412) 762-7089
Fax: (800) 449-7382
Email: erika.eggler@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)
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)
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

__________________________________________________
[DO NOT COMPLETE THIS SECTION]

[DO NOT COMPLETE THIS SECTION]

B: IF BONDS, COMPLETE THIS PORTION

__________________________________________________
[DO NOT COMPLETE THIS SECTION]

[DO NOT COMPLETE THIS SECTION]

The undersigned does (do) hereby irrevocably constitute and appoint

[DO NOT COMPLETE THIS SECTION]

[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.