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:
Mrs. Mariann Gilbride, Director
Office of Development – Diocese of Camden
631 Market Street
Camden, NJ 08102
Phone: (856) 583-6125
Email: Mariann.Gilbride@camdendiocese.org
Fax: (856) 338-0766
PART I: NOTICE OF STOCK GIFT TO THE OFFICE OF DEVELOPMENT

Gift for/to: ______________________________________________________
(House of Charity – Bishop’s Annual Appeal)

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.

Mrs. Mariann Gilbride, 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 Mariann Gilbride 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
116 Allegheny Center – Mail: P8-YB35-02-Z
Pittsburgh, PA  15212
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 – Bishop’s Annual Appeal)

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)
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 __________________________

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.

SIGNATURE

x __________________________ (Signature)

SIGNATURE

x __________________________ (Signature)

NOTE: This is not a notary public service but something most banks offer.

SAMPLE – COMPLETE HIGHLIGHTED SECTIONS ONLY