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 Amy Sajko, Institutional Trust Officer at PNC Bank, NA, at (412) 467-2539 or Amy.Sajko@pnc.com for additional information.

**OR ARE HELD IN CERTIFICATE FORM**
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.

2. 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.

3. 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) 963-2655
PART I: NOTICE OF STOCK GIFT TO THE OFFICE OF DEVELOPMENT

Gift for/to: ________________________________________________
(Ex., Diocese of Camden, Catholic Strong, House of Charity, Parish, School etc.)

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.

Mariann Gilbride, Director
Office of Development
Diocese of Camden
631 Market Street
Camden, NJ 08102
Phone: (856) 583-6125
Fax: (856) 963-2655

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
Amy Sajko
116 Allegheny Center – Mail: P8-YB35-02-Z
Pittsburgh, PA 15212
Phone: (412) 467-2539 Fax: (800) 449-7382
Email: Amy.Sajko@pnc.com

I understand that the Diocese will sell the securities, and that the proceeds will benefit
________________________________________________________
(Ex., Diocese of Camden, Catholic Strong, House of Charity, Parish, School, etc.)

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 ______________________

______________________________
(Signature)

______________________________
(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.)

<table>
<thead>
<tr>
<th>A: IF STOCK, COMPLETE THIS PORTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>_______ shares of the _______ stock of ____________________________ represented by Certificate No(s). _______ inclusive, standing in the name of the undersigned on the books of said company.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>B: IF BONDS, COMPLETE THIS PORTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>_______ bonds of ____________________________ in the principal amount of $ _____________, No(s) _____________________ inclusive, standing in the name of the undersigned on the books of said company.</td>
</tr>
</tbody>
</table>

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 ____________

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)