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. Katie Comerford-Rivera, Director
Office of Development – Diocese of Camden
631 Market Street
Camden, NJ 08102
Phone: (856) 583-6125
Email: Katie.Comerford@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.

Katie Comerford, 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 Katie Comerford 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)