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 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-Rivera, 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-Rivera 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 __________________________

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

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.