



DIOCESE OF CAMDEN
OFFICE OF DEVELOPMENT

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 Lisa Labue, Institutional Trust Officer at PNC Bank, NA, at (412) 467-2539 or Lisa.Labue@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:

Stacy Napolitano, Director of Development

Office of Development – Diocese of Camden

631 Market Street

Camden, NJ 08102

Phone: (856) 583-6126

Email: Stacy.Napolitano@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, South Jersey Catholic Ministries Appeal, 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.

Stacy Napolitano, Director
Office of Development
Diocese of Camden
631 Market Street
Camden, NJ 08102
Phone: (856) 583-6126
Fax: (856) 963-2655

If you have any further questions regarding the transfer of stock or other securities, please contact Stacy Napolitano in the Office of Development at (856) 583-6126. 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
Lisa Labue
116 Allegheny Center – Mail: P8-YB35-02-Z
Pittsburgh, PA 15212
Phone: (412) 762-6538 Fax: (800) 449-7382
Email: Lisa.Labue@pnc.com

I understand that the Diocese will sell the securities, and that the proceeds will benefit

(Ex., Diocese of Camden, Catholic Strong, South Jersey Catholic Ministries Appeal, 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)

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.)

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 _____ stock or bond(s), as the case may be, on _____ attorney to transfer the said st _____ may be, on the books of said Company, with full power of substitution in the premises.

DO NOT COMPLETE THIS SECTION

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)