



ROMAN CATHOLIC DIOCESE OF GARY

9292 BROADWAY MERRILLVILLE, IN 46410-7088

Stock Donation Instructions

Thank you very much for supporting the mission of the Catholic Diocese of Gary with a gift of appreciated stock. To complete your donation, please follow the steps outlined below. If further assistance is required, please contact Kathy Tomasik at the Diocese of Gary – Pastoral Center, Finance department.

1. Complete and Submit the Stock Donation Letter of Intention (see Page 2)

A properly completed **Stock Donation Letter of Intention** – Page 2 allows for proper processing of the stock transaction as well as proper identification of the donor. Once completed, please mail, fax, or email the Letter of Intention to the Diocese of Gary, Attn: Kathy Tomasik. Additionally, if the donation is intended for a parish, school or other organization, please send a copy to that organization.

Without a completed Letter of Intention, we will not know where to send the proceeds of the donation.

2. Transfer the stock

You may transfer stock electronically (preferred), by mail, or in person.

To transfer the securities electronically:

Contact your broker with instructions to make a transfer of securities to the Diocese of Gary.

Diocesan Broker name: Peoples Bank Attn: Tom Devine
Address: 9204 Columbia Avenue, Munster, Indiana, 46321
Phone: 219-853-7086
Registration of Account: Roman Catholic Diocese of Gary
DTC Eligible Securities: Participant Number: 901
FFC A/C#: 011167
A/C Name: Peoples Bank – Acct.#272436
Agent Bank #: 80901
Institutional ID #: 40896

a. To transfer certificates by mail:

1. **DO NOT SIGN** the stock certificate.
2. Send the certificate & a completed Stock Donation Letter of Intention (Page 2) by registered mail:
Peoples Bank, Attn: Tom Devine
9204 Columbia Avenue, Munster, Indiana 46311
3. **In a separate envelope** send a completed, signed, dated and **medallion guaranteed Irrevocable Stock or Bond Power form** – Page 3 of this document, together with a copy of the completed Stock Donation Letter of Intention.

b. To hand deliver the securities:

1. **DO NOT SIGN** the stock certificate.
2. Contact Tom Devine of Peoples Bank at phone #219-853-7086 to arrange a time to deliver the stock certificate(s), Irrevocable Stock or Bond Power and Stock Donation Letter of Intention.

Payment Processing and Acknowledgement of Donation

The Diocese of Gary acts as a clearing house for donations of stock. When securities are donated, the Diocese of Gary bank (Peoples Bank) liquidates the securities and sends the proceeds to the Diocese along with a trade confirmation form. The Diocese forwards the proceeds to the parish, school, or other institution as directed by the information provided in the Stock Donation Letter of Intention. Acknowledgement of the gift will be sent to the donor by the final gift recipient, not by the Diocese of Gary.



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PHONE NUMBER: 219-769-9292 ext. 247

STOCK DONATION LETTER OF INTENTION

Please complete this form for all stock donations and forward to the Diocese via email to ktomasik@dcgary.org. Or you may also submit this form by mail to:

Roman Catholic Diocese of Gary
Attn: Kathy Tomasik – Finance Department
Diocese of Gary – Pastoral Center
9292 Broadway
Merrillville, IN 46410

PLEASE FORWARD THIS FORM TO:

Parish, School or other Institution for which the donation is intended (if other than the Diocese of Gary).

Donor Information:

Donor Name: _____ Date: _____

Donor Address: _____

City: _____ State: _____ Zipcode: _____

Donor Parish or School: _____

Donation Information:

Name of Stock: _____ Number of Shares: _____

Intention of Gift (please check):

- _____ Catholic Service Appeal (Diocese of Gary)
- _____ Catholic Foundation for Northwest Indiana
- _____ Parish (Please specify details below)
- _____ School (Please specify details below)
- _____ Other Institution (Please specify details below)

If Parish, School or other Institution please specify:

Name of Parish, School or other Institution: _____

Address: _____

City: _____ State: _____ Zipcode: _____

Donor Broker: _____

I (we) plan to transfer the securities (please check one of the following):

- _____ electronically
- _____ by mail
- _____ delivered in person

Donor Signature (s): _____ Date: _____

Donor Signature (s): _____ Date: _____



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IRREVOCABLE STOCK/BOND POWER

FOR VALUE RECEIVED, the undersigned does (do) hereby sell, assign and transfer to

**IF STOCK
COMPLETE
THIS
PORTION** _____ shares of the _____ stock of _____
represented by Certificate (s) No. (s) _____ inclusive,
standing in the name of the undersigned on the books of said Company.

**IF BOND
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** _____

SIGN HERE ONLY

