



Roman Catholic Diocese of Gary
9292 Broadway
Merrillville, IN 46410
219-769-9292 (ext 247)

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 of Intention** (page 2) allows for proper processing of the stock transaction as well as proper identification of the donor. Once Completed, please mail 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 (See page 4 for details).

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

a. 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, IN 46321
Phone: 219-853 7086
Registration of Account: Roman Catholic Diocese of Gary

b. To transfer certificates by mail:

- i. DO NOT SIGN the stock certificate.
- ii. Send the certificate & a completed Stock Donation Letter of Intention (Page 2) to **Peoples Bank, Attn: Tom Devine, 9204 Columbia Avenue, Munster, IN 46321. Phone: 219-853 7086**
- iii. 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 Intent.

c. To hand deliver the securities:

- i. DO NOT SIGN the stock certificate.
- ii. Contact **Tom Devine of Peoples Bank, at 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. 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 the Diocese of Gary.



STOCK DONATION LETTER OF INTENTION

Please complete this form for all stock donations and forward to the Diocese via email to ktomasik@dcgary.org (219-769-9292 x 247)

Or you may submit this form by mail to:

Roman Catholic Diocese of Gary - Pastoral Center
Attn: Kathy Tomasik – Finance Department
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: _____ ZIP: _____
Donor Parish or School: _____

DONATION INFORMATION:

Name of Stock/Ticker _____ Number of Shares _____
Intention of Gift (please check): CUSIP # _____
____ Catholic Services 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: _____ ZIP: _____
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: _____



ROMAN CATHOLIC DIOCESE OF GARY

9292 BROADWAY MERRILLVILLE, IN 46410-7088

IRREVOCABLE STOCK/BOND POWER

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

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

IF BOND _____ bonds of _____
COMPLETE in the principal amount of \$ _____, No. (s) _____ inclusive,
THIS standing in the name of the undersigned on the books of said Company.
PORTION

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

<p><u>Account Transfers (ACATS):</u></p>	<p>Deliver DTC/NSCC/FISERV eligible issues to:</p> <p>DTC Participant #2042 FBO: PEOPLES BANK / IN #97</p> <p>Contacts: Inbound/Outbound Transfers: 800-749-0752 Option 5</p> <p><u>Global Transactions:</u> Please contact Reliance Trust for Free of Payment (FOP) movements.</p> <p>For specific global settlement instructions, please contact the Account Transfer department at Reliance_assettransfersmailgroup@fisglobal.com When calling, please reference the client name and account number/institution #.</p>
<p><u>Mutual Funds</u></p>	<p>Deliver to NSCC Participant #5962 Please register and forward subsequent dividends to: Reliance Trust Company FBO PEOPLES BANK PEOPLES BANK / IN #97 / RIS1 P.O. Box 48529 Atlanta, GA 30362 Tax ID# 58-1428634</p>
<p><u>DTC</u></p>	<p>Deliver to DTC Participant #2042 Agent Bank ID 54877 Institution ID 62497</p>
<p><u>Government Securities</u> (bonds, bills, notes, strips agencies, GNMA, and FNMA)</p>	<p>Bank of NYC/CUST/143233 ABA Number: 021000018 FBO PEOPLES BANK / IN #97</p>
<p><u>Physical Deliveries:</u></p>	<p>Reliance Trust Company FBO PEOPLES BANK / TRUST ACCOUNT # Attention: Account Transfers 201 17th Street NW Suite 1000 Atlanta, GA 30363</p>
<p><u>Physical Checks:</u></p>	<p>Reliance Trust Company FBO PEOPLES BANK / TRUST ACCOUNT # Attention: Account Transfers PO Box 5394 Carol Stream IL 60197-5394</p> <p><i>For overnight delivery:</i> Reliance Trust Company Box 5394 270 Remington Blvd Ste B Bolingbrook IL 60440</p>
<p><u>Re-Registration Instructions:</u></p>	<p><i>For physical securities and book-entry account:</i> Reliance Trust Company Attn: Account Transfers FBO PEOPLES BANK / TRUST ACCOUNT # 201 17th Street NW Suite 1000 Atlanta, GA 30363</p>
<p><u>Fed Wire Instructions (Cash):</u></p>	<p>ABA# 021000021 JPMorgan Chase A/CH 388921725 Reliance Trust Company Attn (RTC Contact Name) FBO PEOPLES BANK / TRUST ACCOUNT #</p>
<p><u>Trade Settlement Contacts</u></p>	<p>Heather Benjamin: 414-815-3554 Julie Jaworski: 414-815-3580 Global Transactions: Reliance_Tradesettlementmailgroup@fisglobal.com</p>
<p><u>Cost Basis Reporting</u></p>	<p>Send transfer statement to: Reliance_costbasis@fisglobal.com</p>