



Stock Donation Form

Donor Information

Donor Name _____ Address _____
Home Phone Number _____ City, State Zip _____
Cell Phone Number _____ E-Mail Address _____

Notification For Stock Transfer

Expected Date of Transfer _____ Name of Stock _____
Symbol _____ # of Shares _____

Donor's Broker Information

Brokerage Firm _____ Address _____
Contact Person _____ City, State Zip _____
Phone Number _____ Fax Number _____
E-mail address _____

Please instruct the brokerage to fax or e-mail this form to: Diane Donnelly FAX: 712-233-7598 or dianed@scdiocese.org

Upon receipt of this form, the broker will be given the DTC and account number for the Diocesan brokerage account. It is imperative the diocesan office is notified prior to the transfer so credit can be attributed to the proper donor.

MLTF Gift Policy requires that stock donations have an approximate minimum value of \$1,000. Stock donations can be accepted until December 15th or within \$100,000 of goal if tax credits are still available.

The donor should complete an MLTF donor form and indicate the name of the stock and number of shares donated (but not the value) on the form. Gift forms should be returned to the diocesan offices at the contact information listed above

Please contact the following with questions:

Kristie Arlt 712-233-7513 kristiea@scdiocese.org
Diane Donnelly 712-233-7594 dianed@scdiocese.org
Royce Ranniger 712-233-7592 roycer@scdiocese.org

FOR INTERNAL USE ONLY

Person Contacted: _____ Date Contacted _____
Sale Authorized by: _____ Date _____