



INSTRUCTIONS FOR DONATING STOCK AND MUTUAL FUNDS to the Archdiocese of Indianapolis and its ministries

Thank you for your support of a parish, school or agency of the Archdiocese of Indianapolis. Ministries use a single brokerage account to streamline the process, keep gift processing expenses low and ensure an IRS approved acknowledgement. In order to process your contribution in a timely and efficient manner, please follow the outlined process for publicly traded securities such as stock and mutual funds and cash through your brokerage account.

If you have any questions, please contact the Office of Stewardship and Development at ccf@archindy.org, 800-382-9836 ext. 1482, or 317-236-1482.

STEP 1: INITIATE THE TRANSFER WITH YOUR BROKER

It is important that you contact your financial institution to request their required procedures and forms and provide them with the delivery instructions found below. Please ask that they include your name on all deliveries.

Deliver all DTC Eligible Securities to:
Morgan Stanley Smith Barney LLC
DTC Clearing **0015**
For the account of the **Roman Catholic Archdiocese of Indianapolis**
Account Number **337-136954**

Note: Some financial institutions and mutual fund companies require the use of their own form or an additional letter of instruction. If you are transferring mutual funds, please check with your broker to see if the funds are transferable. If they are not transferable, please contact Caryn Wilkinson at Morgan Stanley, 317-818-7388 for further assistance.

STEP 2: NOTIFY THE ARCHDIOCESE ABOUT YOUR TRANSFER – VERY IMPORTANT

Knowing the details of your gift allows us to apply the funds to your intended purpose. There are two ways to notify us of this information – the attached form or by using a secure online form at www.archindy.org/CCF. If using the online form, the attachment can be disregarding.

Completed form, making the archdiocese aware of your gift and designation instructions can be sent as follows:

Mail
Roman Catholic Archdiocese of Indianapolis
ATTN: Office of Stewardship and Development
1400 N Meridian Street
Indianapolis IN 46202

Email
ccf@archindy.org
Please note: email transmissions are not secure

Note: If we do not receive proper notification of a gift, it will be placed into general fund at the Roman Catholic Archdiocese until identified.

STEP 3: CONFIRM YOUR TRANSFER

Transfers must be initiated by your financial advisor or broker. Please confirm with your broker or advisor that your gift has been transferred from your account to the archdiocese account and that the archdiocese has been informed. Once received, it usually takes 5-7 business days for your transfer to be liquidated, settled and posted. It is at this time that we move the funds to the designated ministry, make them aware of the transfer and process a tax acknowledgement for your gift.

LETTER OF AUTHORIZATION

Please accept this letter as my authorization to irrevocably designate the funds/property received by the Roman Catholic Archdiocese of Indianapolis as stated below.

Donor contact information

Donor Name(s): _____ Phone number(s): _____

Donor Address: _____

Donor Email Address: _____

Purpose of the Funds

The funds/property are for the benefit of the following ministry. Please provide additional sheets as needed.

- My gift is to a parish – Parish Name _____
 - General Parish Contribution (unrestricted and/or tithing)
 - Restricted Parish Contribution – please provide further detail: _____

- My gift is to a school or agency – School/Agency Name _____
 - General Contribution (unrestricted)
 - Restricted School/Agency Contribution – please provide further detail: _____

- My gift is to the Archdiocese of Indianapolis
 - United Catholic Appeal
 - Catholic Community Foundation Endowment Fund
please provide fund name and/or fund number: _____

- Other _____

Broker/Fund Details

Delivering Broker/Institution Name: _____ Phone number: _____

Contact person within brokerage firm: _____

Anticipated Date of Transfer: _____

Name of Security	Symbol	Number of Shares	Approx. Value

Please initiate the transfer based on the number of shares and not the dollar value since security values may fluctuate.

SIGNATURES

This is my/our written authorization to irrevocably transfer ownership of the assets specified in this form to the Roman Catholic Archdiocese of Indianapolis. I understand that any contribution, once accepted, represents an irrevocable contribution to the Roman Catholic Archdiocese of Indianapolis and is not refundable to me for any reason.

Donor Full Name (Please Print)

Donor Signature

Date