



GIFTS OF SECURITIES

Instructions:

(1) Do not sell the stock – instead the most common method to make a donation of stock is to have your broker transfer the stock electronically to the account of the Archdiocese of Philadelphia **and 100% of the net proceeds from the sale of your stock will go to St. Patrick Parish Malvern.** If you own stock in a certificate form, please contact the Office for Investment Services for instructions.

The donor, not the Parish or the Archdiocese, must be the party that initiates the transfer of the stock with his/her agent/broker. Please supply the following information to your broker to have the stock donation transferred electronically.

DTC #: 0141 (First Clearing/Nations)
Account #: 1176-3039
Name on Account: Archdiocese of Philadelphia
Broker: McCloskey Financial Group

Please do not use the parish name as the account name. The account name must be the Archdiocese of Philadelphia.

(2) Important: The donor (or their broker/transfer agent) must also contact the Archdiocesan Office for Investment Services before the transfer is executed to ensure the stock donation can be identified with the donor name when it arrives in the Archdiocese of Philadelphia’s brokerage account, and to make certain you are properly credited for your stock donation. Please submit the following information:

Date _____

Donor Name(s) _____

Address _____ City _____ State _____ Zip _____

Phone Number _____ Email Address _____

Recipient of Donation St. Patrick Parish Malvern

Name of Stock	Number of Shares

Please email Al Tomaselli, Office for Investment Services, with the required information or to inquire about security gifts in certificate form.

Email: RGunn@ArchPhila.org

Please know how deeply we appreciate your generosity and the impact that this gift will make on the Church!