Transfer instructions for Donors with Stock or Mutual Fund Donations

For all gifts of stock:

A letter of authorization from the donor to the parish is required. A letter sample is attached. If you have any questions call Mike Taylor at the number indicated below. Fax a copy to Mike Taylor at 415-364-4509 and Karen Kwong at 415-614-5512 or email to mtaylor@firstrepublic.com and kwongk@sfarch.org.

STOCK CONTRIBUTIONS

A. Transfers from a Donor Account at a Brokerage House

Note: Donor's Broker must initiate transfer.

In addition to the letter mentioned above, please give the following information to the donor broker for transferring to the Archdiocesan broker. (Broker to Broker)

1. First Republic Securities Co., LLC

Attn: Mike Taylor Phone: 415-364-4870 111 Pine Street Fax: 415-364-4509

San Francisco, CA 94111

Email: <u>mtaylor@firstrepublic.com</u>

- 2. First Republic Securities Co., LLC DTC #0443
- 3. S.F.Archdiocesan Account number is: 33L-070589
- 4. Account Name: Archdiocese of San Francisco
- 5. Instruct your donor's broker to include the following information on the <u>trailer</u> line (second line) of their transfer instructions.
 - FBO (provide Parish Name) and (Donor Name)

NOTE: Failure to include the above information for each transfer will delay identifying the donation and could cause us not to acknowledge the donation in timely manner.

B. Stock Certificates donated directly by Donor

- 1. Instruct the donor to deliver the stock certificate and an executed stock power to your Parish Office.
- 2. OR they can deliver their stock certificate and an executed stock power form (via registered mail) to First Republic Securities at the above address. A letter of authorization must accompany the stock certificate and executed stock power.

Date:			
Mike Taylor First Republic Securities Co., LLC 111 Pine Street San Francisco, CA 94111			
Re:			
Dear Mr. Taylor:			
Please accept this as your authorizat	tion to deposit		shares of
	_ stock into accou	ınt no. 33L-0705	89, for the
Archdiocese of San Francisco.			
This donation is for the benefit of _			_ Parish/School.
Sincerely,			
Customer Signature	_	PRINT NAME	
Joint Customer Signature	<u> </u>	PRINT NAME	
Phone Number:			
Email address:			

Email copy to kwongk@sfarch.org at (415) 614-5522