

LETTER OF INTENTION TO DONATE SECURITIES

Date \_\_\_\_\_

Please complete this form and provide it to the Catholic Diocese of Harrisburg prior to making a donation. Failure to do so may prevent the securities from being properly delivered. Please make sure that you notify your broker of your intent to donate these assets. You may share this document with your broker in order to assist the initiating of the transfer. Simply notifying the Diocese will not authorize the transfer.

Completed forms can either be faxed to (717) 657-4818 or emailed to [development@hbgdiocese.org](mailto:development@hbgdiocese.org)

or

Mail to: Catholic Diocese of Harrisburg  
Office of Stewardship & Development  
4800 Union Deposit Road  
Harrisburg, PA 17111-3710

I/We would like to donate the following securities to the Diocese of Harrisburg as a charitable gift.

Name of company \_\_\_\_\_

Number of shares \_\_\_\_\_

Beneficiary parish/school/institution \_\_\_\_\_

Purpose of gift (e.g., capital campaign, regular offering, special gift) \_\_\_\_\_

The most expedient methods of transfer are described below. Other methods of delivery may result in a delayed transfer. Please select one:

\_\_\_\_\_ Stock shares are presently being held in a brokerage account as indicated below:

\_\_\_\_\_ If donating a mutual fund, it is important that you contact the Office of Stewardship & Development at the Catholic Diocese of Harrisburg for additional instructions prior to completing this form. Please call 717-657-4804 or email [development@hbgdiocese.org](mailto:development@hbgdiocese.org) for instructions.

Name of brokerage firm \_\_\_\_\_

Account # \_\_\_\_\_ Name of brokerage representative \_\_\_\_\_

Please accept this letter as authorization to transfer the above-indicated shares to JP Morgan Chase Bank using the following instructions. A copy of this letter must be mailed to your brokerage representative.

Bank: JP Morgan Chase Bank  
DTC Participant #: 902  
FFC to Account #: P72500  
For Account #: PBD#Q41373-004  
For Account of: The Diocese of Harrisburg – Donations – Equity Port

Name(s) of donor(s) – please print \_\_\_\_\_

Signature \_\_\_\_\_

Address \_\_\_\_\_

Address \_\_\_\_\_

Telephone (\_\_\_\_\_) \_\_\_\_\_ (\_\_\_\_\_) \_\_\_\_\_