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 be emailed to 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 x 336 or email 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 (_____)_____ (_____)_____