



## ***Stock Gift Instructions***

Please follow these instructions for gifts benefiting the Archdiocese directly such as the Archbishop's Call to Share annual appeal, a specific parish, school, cemetery, ministry or campaign within the Archdiocese; or a fund at the Catholic Foundation of Northeast Kansas.

*If your stock or securities are held electronically at a brokerage firm:*

- ❖ It is important that you communicate to your brokerage firm the exact information as follows when wiring securities to the Archdiocese of Kansas City in Kansas:

Archdiocese of Kansas City in Kansas Brokerage Account

UBS, DTC #221

For the benefit of the Archdiocese of Kansas City in Kansas, ***NAME OF RECIPIENT***, Account #EI-50985-66

- ❖ In addition to instructing your brokerage firm to wire securities, send an email to [stockgift@archkck.org](mailto:stockgift@archkck.org) with the following information:
  1. Donor's name and address for tax receipt letters
  2. Stock name and ticker symbol
  3. Number of shares
  4. Expected date of transfer
  5. What the proceeds of the stock gift is to benefit; i.e. name and address of the parish, school, cemetery, endowment or fund at the Catholic Foundation of Northeast Kansas, the Archdiocese of Kansas City in Kansas, or a specific ministry, campaign or appeal within the Archdiocese.

*If you hold the stock certificates or securities:*

- ❖ Send an email to [stockgift@archkck.org](mailto:stockgift@archkck.org) requesting the appropriate forms and materials or call (913) 647-0315 to discuss and coordinate your stock or securities gift.
- ❖ Mail or hand-deliver (in envelopes provided by the Stewardship & Development Office) the certificate(s) and the completed forms to the Stewardship & Development Office. Please use separate envelopes for each.

***Please note that the value of any gift of appreciated stock or securities is valued on the date it is received by the Archdiocese of Kansas City in Kansas. The gift's value is determined by using the average of that day's high and low figures for those shares received.***