



UPON THIS ROCK

A Campaign for St. Peter's

Giving Options - Gifts of Securities and Mutual Fund Shares

A gift of appreciated stock or mutual fund shares may be a great way to fulfill your pledge to our campaign. Such gifts often provide significant tax advantages to the donor, and maximize the net value of your gift.

Gifts of stock and mutual fund shares are processed through the Wells Fargo account held by the Diocese of Kansas City-St. Joseph. Because your gift is designated, "For the benefit of St. Peter's Parish Capital Campaign," 100% of the gift is passed to the parish.

We ask you to take a couple of steps to help your transfer go smoothly.

1. Please let us know that you are preparing to make a gift of stock or mutual fund shares. A phone call or email to our development director Karen Conley is fine. She may be reached at 816.800.0105 or kconley@stpeterskc.org.
2. Please let us know when you plan to execute the transfer. Approximate timing is fine.
3. Please let us know the name of the securities to be transferred, as well as then number of shares, or approximate value of the shares.

We will convey this information to our contacts at the diocese, so they may be watching for the transfer, and will have the information they need to process your gift quickly.

4. All information necessary to initiate your transfer is incorporated into the form on the reverse.
5. If your gift involves a physical certificate, please contact Karen Conley to arrange at time to bring it into the parish office. We can then make sure we have all the necessary information to process your gift.

Thank you for supporting this important campaign.

Catholic Diocese of Kansas City – St. Joseph
Gift of Securities and Mutual Funds
DTC Transfer

Please gift _____ of _____
Shares/Unit Security

From my Account Number _____ at _____
Delivering Firm

To: Catholic Diocese of Kansas City – St. Joseph
Wells Fargo Advisors, LLC
Account #5328-3701
DTC # 0141

For the benefit of: **St. Peter's Parish Capital Campaign**

Signature: _____

Signature: _____

Contact: Linda Maclean
Registered Client Associate

Margo A. Shepard, CFP, CIMA
Senior Financial Advisor

Wells Fargo Advisors, LLC
7500 College Blvd. Suite 200
Overland Park, KS 66210

Margo Telephone: (913) 663-6054
Linda Telephone: (913) 234-7704
Team Fax: (913) 234-7718

Margo.Shepard@wellsfargo.com
linda.maclean@wellsfargo.com

Instructions to Donor:

1. Please give this original signed letter of authorization to the delivering firm
2. Please fax or mail a copy of this signed letter to (913) 234-7718 Attn: Linda Maclean so we can notify the above organization and track your gift.