

## Donating Securities and Mutual Funds

Donating appreciated stock or mutual fund shares is a strategic gift-planning method. The donor receives an itemized deduction in the amount of the fair market value (FMV) of the shares donated as of the date the gift arrives at Wells Fargo. This value is tax-deductible and can be carried over for up to five (5) years after the year of the gift.

Procedure:

To accomplish a gift of securities or mutual fund shares, contact our diocesan office of Stewardship and Development, Laura Gray at (816) 756.1851, ext. 529, or Kathy Sloss at (816) 756.1851, ext. 518.

**If your securities are in “certificate form”** it will be necessary to execute a stock power form which can be provided by your broker or other financial adviser.

**If your securities or mutual funds are in “street name” or held by a brokerage firm**, it will be necessary to use the diocesan DTC form using our diocesan brokerage account. The Diocese of Kansas City-St. Joseph is designated as **Catholic Diocese of Kansas City-St. Joseph, Wells Fargo Advisers Account #5328-3701, DTC #0141**. Once you have completed this form, please have your broker send it to Linda Maclean by fax (913) 234.7718 or [lindamaclean@wellsfargo.com](mailto:lindamaclean@wellsfargo.com). Linda’s phone number is (913) 234.7704

A form for your use follows on page two.

Note well:

When executing a gift of securities or mutual funds, it is necessary to notify:

1. Your broker or financial adviser
2. The diocese’s broker listed above
3. The diocesan office of Stewardship and Development

*Contact information,:*

Linda Mclean, (913) 234.7704, or [lindamaclean@wellsfargo.com](mailto:lindamaclean@wellsfargo.com)  
Kathy Sloss, (816) 756.1858, ext. 518 or [sloss@diocesekcsj.org](mailto:sloss@diocesekcsj.org), or  
Laura Gray (816) 756.1858, ext. 529 or [gray@diocesekcsj.org](mailto:gray@diocesekcsj.org)  
Karen Conley, (816) 800.0105, or [kconley@stpeterskc.org](mailto:kconley@stpeterskc.org)

# Catholic Diocese of Kansas City-St. Joseph

## DTC Transfer Instructions

**Catholic Diocese of Kansas City-St. Joseph**

DTC #0141

Account #5328-3701

Please gift the following:

Shares: \_\_\_\_\_

Security: \_\_\_\_\_

For the benefit of: \_\_\_\_\_

From account #: \_\_\_\_\_

Signature: \_\_\_\_\_

Signature: \_\_\_\_\_

**Contact Linda Maclean, Registered Client Associate, for additional assistance.**

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

Tel: 913.234.7704  
Fax: 913.234.7718  
linda.maclean@wellsfargo.com

Please give this letter of authorization to the firm delivering the securities and **mail/fax/email a copy to Linda Maclean at the Wells Fargo address above.**