

## 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.

**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 913.234.7717 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)

Laura Gray FAX (816) 756.5089, or [gray@diocesekcsj.org](mailto:gray@diocesekcsj.org)

Karen Conley, (816) 800.0105, or [kconley@stpeterskc.org](mailto:kconley@stpeterskc.org)

DTC (Depository Trust Company) Transfer Instructions

Gift of Securities, DTC Transfer

Please gift the following:

<u># of shares</u>	<u>Security Name</u>	<u>Symbol (optional)</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

From My Account Number \_\_\_\_\_ at \_\_\_\_\_  
*(delivering firm)*

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

Please designate my gift as follows

St. Peter's Parish ETFCE  
Endowment Trust Fund for Catholic Education  
815 East Meyer Boulevard  
Kansas City, MO 64131

\_\_\_\_\_  
**Signature of account owner**

\_\_\_\_\_  
**Signature of account owner**

Date: \_\_\_\_\_

Date \_\_\_\_\_

Printed Name and Address  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Printed Name and Address  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Contact:**

Linda Maclean 913-234-7704  
Wells Fargo Advisors, LLC  
7500 College Blvd., Suite 200, Overland Park, KS 66210

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Instructions to Donor:

1. Please give the original signed letter of authorization to the delivering broker.
2. Please fax, email or mail a copy of the signed letter to Linda Maclean FAX 913-234-7717, [linda.maclean@wellsfargo.com](mailto:linda.maclean@wellsfargo.com), of the mailing address above.
3. Please send a copy to the diocese at FAX 816-756-5089, [gray@diocesekcsj.org](mailto:gray@diocesekcsj.org), or Stewardship and Development, Attn: Laura Gray, Diocese of Kansas City-St. Joseph, PO Box 419037, KCMO 64141-6037.