

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. 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
Laura Gray FAX (816) 756.5089, or gray@diocesekcsj.org
Gwen Hoefler, (816) 800.0105, or ghoefler@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 for [provide specifics] as follows [full name and address]

The following parish or school

The Diocese of Kansas City-St. Joseph for the benefit of:

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

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, of the mailing address above.
3. Please send a copy to the diocese at FAX 816-756-5089, gray@diocesekcsj.org, or Stewardship and Development, Attn: Laura Gray, Diocese of Kansas City-St. Joseph, PO Box 419037, KCMO 64141-6037.