

ARCHDIOCESE OF BOSTON

STOCK, BOND, AND MUTUAL FUND DONATION INSTRUCTIONS

For any stock and/or mutual fund donation for the Archdiocese of Boston (Catholic Appeal, Parish, School, or Agency), the following instructions will walk you through the steps necessary to complete your generous donation. Should you require a donation package, as discussed below, or need any further assistance, please contact the Stock Donation coordinator at 617-746-5711, or email to Larchambault@rcab.org

For all Securities donations, whether electronically transmitted or delivered as physical certificates, a Donor Letter of Intention must be completed and submitted. If you are donating physical securities (stock or bond certificates), you will also need to provide an Irrevocable Stock or Bond Power (from Deutsche Alex Brown). Both of these documents will be provided in a donation package. They will soon be available for download from our website at <http://www.bostoncatholic.org/Ways-To-Give-Back/>.

PHYSICAL SECURITY DONATIONS - If donating with physical securities (stock or bond certificates), a donation package will be provided to you from your Parish, School, Agency, or by requesting via the Coordinator telephone line or email stated above. This package will contain a pre-addressed and prepaid envelope in which to submit your donated securities. We ask that you ***DO NOT SIGN*** the stock certificate(s). Also in the donation package you will find enclosed a Donor Letter of Intention and Irrevocable Stock or Bond Power. It is critical that the Stock Power be signed as the name appears on the stock certificate. These should be completed, signed and sent separately to our stock donation coordinator. That address is:

Archdiocese of Boston
Attn: Leocadia Archambault
66 Brooks Drive
Braintree, MA 02184

When dealing with physical securities, this is our preferred method of transacting as it is the most secure for you.

HAND DELIVERY OF SECURITY DONATIONS – If you feel you must deliver the securities in person, we ask that you deliver them to:

Leocadia Archambault, Stock Donation Coordinator
Archdiocese of Boston
66 Brooks Drive
Braintree, MA 02184

Please call (617-746-5711) or email Larchambault@rcab.org in advance of delivery so that a time can be arranged to receive your stock or bond donation, the Donor Letter of

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Intention, and the Irrevocable Stock or Bond Power. Be certain to receive a signed confirmation / receipt for your donation.

ELECTRONIC SECURITY DONATIONS – If your securities are held within a brokerage account, you can donate electronically. We would request that you call or email the Stock Donation coordinator to inform them of the transaction (name of the security and number of shares) so we can notify our Broker to be expecting it. Given new securities laws, we are not able to accept securities without knowing in advance who the donor of the securities is. You can then execute your donation by instructing your Broker to transfer the securities as follows:

Deutsche Bank Alex Brown
DTC Number 443 (cleared by Pershing)
Account Number: 5XM247345
For the Benefit of: Roman Catholic Archbishop of Boston, A Corp Sole

The Donor Letter of Intention can then be submitted via U.S. Mail or email to Larchambault@rcab.org

You can also send this via facsimile to Leocadia Archambault at 617-779-4568. Should you have any questions of our Broker, please feel free to contact Eileen Murphy at 617-217-6155

MUTUAL FUND DONATIONS – As there are various methods of transactions required to obtain funds from Mutual Fund accounts, we request that you contact the Stock Donation Coordinator at either 617-746-5711 or Larchambault@rcab.org before making a mutual fund donation. They will be able to assist with any such transaction. Often a mutual fund company will require that an account be established in the name of the donation recipient, in this instance the Archdiocese of Boston / specific Parish / School or Agency. We request that you do not attempt to establish such an account without our involvement as it may complicate the actual receipt of the funds in donation.

Please note that mutual fund donations experience a longer processing time, so keep this in mind when donating at the end of a calendar year or fund raising cycle.

THANK YOU FOR YOUR KIND GENEROSITY