



Catholic Foundation of South Louisiana
Diocese of Houma Thibodaux

STOCK DONATION INSTRUCTIONS

Gifts of stock may be made via electronic transfer. The Catholic Foundation of South Louisiana maintains a brokerage account with Edward Jones Investments for the purpose of processing stock transfers to the Foundation for benefit of the Foundation, Diocese of Houma-Thibodaux or any of its parishes, schools, or agencies. **The Catholic Foundation cannot initiate stock transfers on your behalf. You must contact your broker directly.**

PLEASE PROVIDE ALL INFORMATION REQUESTED BELOW:

NOTICE OF STOCK DONATION:

Name: _____ Parish: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____ (work) _____ (home/cell)

Name of stock and shares donated: _____

Please apply my gift towards: (describe your intent – ABA, Parish or School Endowment, etc.)

If securities are electronically transferred, the gift date is the date securities enter our account at Edward Jones Investments. For hand-delivered securities to the Catholic Foundation Edward Jones Investments, the gift date is the date received. If the securities are mailed to the Catholic Foundation, the gift date is the date of the mailing (recommended sending by registered mail). Stock market fluctuations after the date of delivery (as defined above) will not affect the charitable deduction for tax purposes.

Edward Jones Investments has instructions to sell stock as soon as possible (usually by the business day following their receipt of stock). The actual net proceeds from the sale represent the amount that will be applied as you requested above. The new proceeds will be affected by the actual sale price, as well as broker charge to process the transaction. Accordingly, there will be variance between the charitable deduction amount and the net proceeds from the gift. The Catholic Foundation cannot be responsible for any variance in these amounts.

Please send copies of Pages 1 and 2 to:

Amy Ponson

aponson@htdiocese.org

P.O. Box 505 · Schriever, LA 70395

(985) 850-3116; Fax (985) 850-3216

A. ELECTRONIC TRANSFER BY BROKER

- Please communicate the following information to your broker

To. _____ (Broker Name and Company)

Please transfer _____ shares of _____ stock from my

Account _____ to:

Edward Jones Investments
Bill Hochstetler – (985) 446-9440
Catholic Foundation of South Louisiana
Account # 706-20902-1-7

I/We hereby authorize the above stock transfer:

(Signature) (Date) (Signature) (Date)

B. Direct Donation of Certificate

1. If certificate is titled in the name of the donor:
 - a. Sign certificate
 - b. Include a “letter of intent” with your name, address, stock and share and intent (e.g. Diocese of Houma-Thibodaux – Seminarian Endowment)
 - c. Send by registered mail (or delivery) to the Catholic Foundation of South Louisiana
 - d. Send copy of this two page completed form to the Catholic Foundation of South Louisiana
2. If certificate is title in the name of the Catholic Foundation:
 - a. Send by registered mail (or deliver) to the Diocese, along with this two page completed form.

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