Transfer instructions for Donors with Stock or Mutual Fund Donations

For all gifts of stock:

A letter of authorization from the donor to the parish is required. A letter sample is attached. If you have any questions call Jim Buckley at the number indicated below. Fax a copy to Jim Buckley at 415-296-5839 and Karen Kwong at 415-614-5512 or email to jbuckley@firstrepublic.com and kwongk@sarch.org.

STOCK CONTRIBUTIONS

A. Transfers from a Donor Account at a Brokerage House

Note: Donor’s Broker must initiate transfer.

In addition to the letter mentioned above, please give the following information to the donor broker for transferring to the Archdiocesan broker. (Broker to Broker)

1. First Republic Securities Co., LLC
   Attn: Jim Buckley       Phone: 415-296-5839
   111 Pine Street       Fax: 415-364-4509
   San Francisco, CA 94111
   Email: jbuckley@firstrepublic.com

2. First Republic Securities Co., LLC DTC #0443

3. S.F. Archdiocesan Account number is: 33L-070589

4. Account Name: Archdiocese of San Francisco

5. Instruct your donor’s broker to include the following information on the trailer line (second line) of their transfer instructions.

   - FBO (provide Parish Name) ____ and ____ (Donor Name) ____

   NOTE: Failure to include the above information for each transfer will delay identifying the donation and could cause us not to acknowledge the donation in timely manner.

B. Stock Certificates donated directly by Donor

1. Instruct the donor to deliver the stock certificate and an executed stock power to your Parish Office.

2. OR they can deliver their stock certificate and an executed stock power form (via registered mail) to First Republic Securities at the above address. A letter of authorization must accompany the stock certificate and executed stock power.
Date: _______________________

Jim Buckley
First Republic Securities Co., LLC
111 Pine Street
San Francisco, CA 94111

Re:

Dear Mr. Buckley:

Please accept this as your authorization to deposit _______________ shares of _________________ stock into account no. 33L-070589, for the Archdiocese of San Francisco.

This donation is for the benefit of _____________________________ Parish/School.

Sincerely,

______________________________
PRINT NAME

______________________________
PRINT NAME

______________________________
PRINT NAME

Phone Number: ________________

Email address: __________________

Email copy to kwongk@sfarch.org at (415) 614-5522

FRSMemo 10/17