Common Stock Donation Information Sheet

DONOR INSTRUCTIONS

Thank you for your interest in making a donation of stock to benefit the Diocese of Tucson. We are very grateful for your generosity! This form is a guide for donors who wish to make a donation using common stock assets.

The following is an example of the authorization to provide your Financial Advisor: (We ask that you send a copy of these instructions to Chris Barrios at the Diocese of Tucson.)

I give my permission to transfer (insert the # of shares) shares of the stock of (insert the name of the corporation) from the account of (the name of the individual(s) or trust in which the stock is held) to DTC #0015/Morgan Stanley for the credit of Diocese of Tucson, account #257-107955-113 for further credit to (insert here the name of the parish or school or Catholic Diocese of Tucson or the specific charity or ministry that is to receive your donation.)

PLEASE REMEMBER THESE INSTRUCTIONS ARE FOR STOCK TRANSFERS ONLY. IF YOU WISH TO GIFT MUTUAL FUNDS YOU MUST CHECK WITH YOUR FINANCIAL CONSULTANT AS EVERY MUTUAL FUND COMPANY HAS THEIR OWN REQUIREMENTS. BECAUSE OF THIS, YOU SHOULD ALLOW YOURSELF 4-6 WEEKS TO GIFT MUTUAL FUNDS.

If you have any questions regarding your transaction, please contact Chris Barrios at (520) 838-2553, fax number (520) 838-2582 or cbarrios@diocesetucson.org. The mailing address for the Diocese is: Diocese of Tucson, PO Box 31, Tucson AZ, 85702. Morgan Stanley CAN NOT receive calls from donors.

BROKER INSTRUCTIONS

The Financial Institution that handles these transactions for the Catholic Diocese of Tucson is Morgan Stanley, LLC. The instructions to gift stock to the Catholic Diocese are:

Morgan Stanley, LLC, DTC # 0015
Account name: Diocese of Tucson
Account #: 257-107955-113

If you have any questions regarding these instructions, please call Carolyn Sitkowski at Morgan Stanley (520) 745-7038 or (800) 347-3130. Please identify that your call is regarding a donation to the Diocese of Tucson.

If you should need to contact the Catholic Diocese of Tucson, please contact Chris Barrios (see information above).

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