



# The Diocese of Knoxville

## Stewardship & Planned Giving

### GIFTS OF STOCK

Thank you for your desire to make a gift of stock to the Diocese of Knoxville.

The instructions below have been published by the Diocese of Knoxville's Office of Stewardship and Development to complete your transaction in the most timely and efficient manner possible.

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1. Please provide the below information to your broker or financial advisor:

Account Name:	Diocese of Knoxville – TAX ID#62-1357183
DTC #:	0221
Account Number:	KA28078
Mailing Address:	UBS Financial Services, Inc. 800 South Gay Street First Tennessee Plaza, Suite 2600 Knoxville, TN 37929
Phone Number:	800-827-2723
Contact Name:	Tommy Siler

2. Please email or call to provide your name and contact information, name and number of shares of transfer, and intention/designation of your gift.

Contact Name:	Deacon Hicks Armor/Gina Wasilewski
Phone Number:	865-862-5740
Email Address:	stewardship@dioknox.org

3. You will receive a *Gift of Stock Substantiation Form* for your tax purposes

*Please note: To be recorded as a current calendar year donation, the securities must be received by UBS by December 31st. A gift transferred by the donor's broker before December 31st, but received by UBS in January will not qualify as a current calendar year donation. On occasion, transfers are not completed within the same day due to unforeseen circumstances, particularly at year's end.*