

LETTER OF INTENT---Gift of Securities

Date: \_\_\_\_\_

From: (Shareholder/Donor) \_\_\_\_\_

To: (Broker) \_\_\_\_\_

The purpose of this transfer is to make a charitable contribution to the Diocese of Baton Rouge, located at 1800 S. Acadian Thruway, Baton Rouge, LA 70808, Tax I.D. <94/27723/49>, to be used as designated below.

Please provide form to your broker and send a copy to: I y gp'Hekt ej kf Stewardship Director, Diocese of Baton Rouge P.O. Box 2028 Baton Rouge, LA 70821 i hkt ej kf @diobr.org Phone: 225-242-0108 Fax: 225-242-0145

Please also forward a copy to your parish's business office, if applicable.

Please complete one of the following options:

I wish to use my existing Brokerage Account: Please be advised that I, the undersigned, hereby request that \_\_\_\_\_ shares of \_\_\_\_\_ be transferred from my account, # \_\_\_\_\_ at \_\_\_\_\_ (broker) to the Diocese account#: 784-017112-128 DTC# 0015 at Morgan Stanley.

I have opened an account at \_\_\_\_\_ /Acct# \_\_\_\_\_ in the name of the Diocese and have deposited \_\_\_\_\_ shares of \_\_\_\_\_. Please forward the latest statement from the account, along with this completed form to the Diocese.

I/We direct the Diocesan office to designate the proceeds of this donation as follows:

For the benefit of my Parish, \_\_\_\_\_ Name of parish \_\_\_\_\_ City \_\_\_\_\_

General Fund Building Fund Other \_\_\_\_\_ Please Specify (Ex. Capital Campaign) \_\_\_\_\_

Other \_\_\_\_\_

Bishop's Annual Appeal: Parish to Credit: \_\_\_\_\_ City \_\_\_\_\_

Works of Mercy Trust Fund Catholic Charities

Seminarian Scholarship Fund Priest's Retirement Fund

Other \_\_\_\_\_ Please specify \_\_\_\_\_

Please send acknowledgement of the completed transfer at the following address:

\_\_\_\_\_ Phone#: \_\_\_\_\_

Print Donor Name

Donor Signature

Print Donor Address

Print Donor Name (Joint Account Holder)

Donor Signature (Joint Account Holder)

For further assistance, please contact: I y gp'Hekt ej kf , 225.242.0108 i hkt ej kf B f kqdtQti