

GIFT OF STOCK INSTRUCTIONS

If the stock is held in a brokerage account, **electronic transfer of stock shares** is an efficient way to donate the stock to St. Bartholomew.

STEP 1: Notify your broker that you wish to make a donation of securities to St. Bartholomew Catholic Church. Your broker will need a written authorization from you before they can make the transfer. Be sure to tell them the name of the stock that you want to transfer, the number of shares and where you want the stock to be transferred:

Charles Schwab & Co., Inc.
7401 Wisconsin Ave., Suite 100
Bethesda, MD 20814
DTC # 0164
FBO: St. Bartholomew Gifting Account
Account # 10064076

STEP 2: Call, fax or email Ari Strait at Charles Schwab & Co. and tell him of the impending transfer of shares.

301-941-9813 Direct
800-435-4000 Main
301-941-9811 Fax
Ari.Strait@schwab.com

STEP 3: Call or email Linda O'Sullivan (stbartsrectory@gmail.com) and notify her of the planned transfer and where you would like to designate your gift. She will provide you with a letter acknowledging the gift for tax purposes after the funds are received. The value of the gift should be as of the date you transfer the shares and should be provided to you by your broker.

Please note: if you hold the securities yourself, signed securities are as good as cash. We recommend that you hand deliver the certificates to Charles Schwab at the above address. Call Ari Strait for an appointment (co-owners of the securities must both be present). If you prefer to mail the certificates, you will need to complete two forms that are available at the rectory and to have one notarized. The forms and certificates should be mailed using a traceable delivery service like UPS/Fed Ex/Priority Mail. As always, we do ask that you call Linda O'Sullivan at the rectory to notify her of your actions, and where you would like to designate your gift.

Are you contributing shares of a mutual fund? Contact your broker first for information as to whether the mutual funds can be transferred directly. (Only a few can not). If the shares are transferable, continue as above for gifts of stock.