



Thank you for your interest in supporting the ministries of The Catholic Foundation of the Diocese of Sacramento. We sincerely appreciate your generosity and your help in furthering our mission to serve those in need throughout Northern California.

If you are considering a donation of stock or securities, please refer to the attached forms. The type of asset you plan to donate will determine which form to use. Your stockbroker or financial advisor can assist you in completing the appropriate form and navigating the process.

To ensure proper handling of your gift, please be sure to:

- Specify where you would like your donation applied (e.g., your parish, a specific endowment, the Annual Catholic Appeal, etc).
- Consult your financial advisor for guidance regarding your personal tax situation.
- Provide your contact information, including mailing address, email, and phone number.

Once your donation is received, we will send you the appropriate tax forms and an acknowledgment letter for your records.

**The Tax ID# for the Catholic Foundation is 20-0487827**

If you have any questions, please feel free to contact Tony Riehl at the Catholic Foundation at 916-733-0274 or email at [triehl@scd.org](mailto:triehl@scd.org)

Thank you again for your generous support.

**USE THIS FORM FOR DTC ELIGIBLE SECURITIES THAT ARE HELD AT A BROKERAGE FIRM**  
*(COMPLETED FORM SHOULD BE GIVEN TO YOUR FINANCIAL ADVISOR FOR PROCESSING)*

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

To: \_\_\_\_\_

*(Name of your brokerage firm)*

From: \_\_\_\_\_

*(Donor's name(s))*

Attn: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Re: Account # at your brokerage firm: \_\_\_\_\_

In the name of: \_\_\_\_\_

*(Account title where shares are coming from)*

Please accept this letter as your authorization to electronically transfer (through DTC) the below listed securities from our account above as follows:

<u># of Shares</u>	<u>Name of Security or Symbol</u>
_____	_____
_____	_____
_____	_____

To: MERRILL LYNCH  
DTC #: 8862  
Account #: 284-02439  
Name of: The Catholic Foundation of the Diocese of Sacramento, Inc.

Charitable gift to: \_\_\_\_\_

*(Name/location of Parish—Include any specifics such as special projects, building or scholarship funds.)*

Sincerely,

*(All account holders or authorized signers of account must sign below to authorize your brokerage firm to transfer the shares.)*

X \_\_\_\_\_,  
*(Account owner signature to authorize transfer)* *(Title if applicable, e.g. Trustee)*

X \_\_\_\_\_,  
*(Account owner signature to authorize transfer)* *(Title if applicable, e.g. Trustee)*

**Please send a copy of this completed letter by mail or fax to:**

Katie Kelly  
Merrill Lynch  
555 Capitol Mall, Ste. 1400  
Sacramento, CA 95814  
Phone: (916) 648-6333  
Fax: (916) 265-0090

**USE THIS FORM FOR NON-DTC ELIGIBLE SECURITIES THAT ARE HELD AT A BROKERAGE FIRM**  
*(COMPLETED FORM SHOULD BE GIVEN TO YOUR FINANCIAL ADVISOR FOR PROCESSING)*

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

To: \_\_\_\_\_  
*(Name of your brokerage firm)*

From: \_\_\_\_\_  
*(Donor's name(s))*

Attn: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Re: Account # at your brokerage firm: \_\_\_\_\_

In the name of: \_\_\_\_\_  
*(Account title where shares are coming from)*

Please accept this letter as your authorization to transfer the below listed mutual fund(s) from our account listed above as follows (please note that the mutual fund can be sent via ACAT (0671) **or** to our Merrill Lynch house account):

<u>Number of shares</u>	<u>Symbol and Fund Name</u>
_____	_____
_____	_____
_____	_____

To Merrill Lynch: ACAT # 0671 **or** House Account #  
*(Please call Katie Kelly at (916) 648-6333 with the symbol of the mutual fund to obtain our House Account #.)*

For further credit to: Account #: 284-02439  
Name of: The Catholic Foundation of the Diocese of Sacramento, Inc.

Charitable gift is for the benefit of: \_\_\_\_\_  
*(Name/location of Parish—Include any specifics such as special projects, building or scholarship funds.)*

Sincerely,

*(All account holders or authorized signers of account must sign below to authorize your brokerage firm to transfer the shares.)*

X \_\_\_\_\_,  
*(Account owner signature to authorize transfer) (Title if applicable, e.g. Trustee)*

X \_\_\_\_\_,  
*(Account owner signature to authorize transfer) (Title if applicable, e.g. Trustee)*

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**DONATE A STOCK HELD DIRECTLY WITH THE COMPANY OR  
TRANSFER AGENT OF COMPANY**

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Contact the company or transfer agent listed on your statement. Tell them you want to donate shares of your stock to:

NAME: THE CATHOLIC FOUNDATION OF THE DIOCESE OF SACRAMENTO, INC.  
EIN: 20-0487827  
ADDRESS:  
Attn: Tony Riehl\*  
2110 BROADWAY  
SACRAMENTO CA 95818-2518  
PHONE: (916) 733-0274

*\*If the company requires more information about the Diocese please contact Tony Riehl at (916) 733-0274.*

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**IMPORTANT:** Please mail or fax the following information about your donation to Katie Kelly at the contact below. This information is needed so the Diocese can send a thank you letter and the tax form.

**Name of Security Donated:** \_\_\_\_\_

**Number of Shares Donated:** \_\_\_\_\_

**Approximate Date of  
Donation:** \_\_\_\_\_

**Name of Parish:** \_\_\_\_\_

**Donation is For the Benefit of  
& Parish Name:** \_\_\_\_\_

\_\_\_\_\_

**Donor Name(s):** \_\_\_\_\_

**Donor Address:** \_\_\_\_\_

\_\_\_\_\_

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